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ABSTRACT

The objectives of the Wisconsin Task Force on Interlibrary Cooperation and Resource Sharing included gathering information on the current status and apparent trends in interlibrary cooperation and resource sharing in Wisconsin and elsewhere, identifying gaps and problems to be dealt with in planning, and making recommendations for future developments. Barriers to cooperation identified included legal problems, lack of funds, inconsistent planning, and inadequate communication. It was decided that the cooperative structure must include participation by all types of libraries in the state and it must clearly define the role of each participant. Data were gathered on existing library collections, clienteles, participation in cooperative activities, use of computerized information retrieval, and communication systems. Principles of library service basic to interlibrary cooperation were identified, and a cooperative structure for the state, regional, and local levels was recommended. Appendixes include lists of task force members and current cooperative organizations, results of research projects carried out by the task force, and a 16-item bibliography. (PF)

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INTERLIBRARY COOPERATION

A Wisconsin Plan

Report of the Task Force on Interlibrary Cooperation and Resource Sharing

U.S. DEPARTMENT OF HEALTH,
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FOREWORD

This report is the result of ten months work of the Task Force on Interlibrary Cooperation and Resource Sharing, chaired by Charles Bunge. The 45 participants contributed a wide range of opinions, insights and experiences to the deliberations of the Task Force. Throughout the year Task Force members cordially, diligently and enthusiastically discussed the issues and worked out recommended solutions. This report contains a summary of the issues contemplated and the full Task Force recommendations.

Task Force members, the staff of the Division for Library Services and the project coordinator extend their appreciation to all those who took the time to answer the survey questionnaire and take part in the case studies, thereby contributing greatly needed information to the Task Force for consideration during its meetings. Special appreciation is extended to the members of the Steering Committee who attended many extra meetings, helped work through a number of complex issues, contributed to the planning of each meeting and helped insure the successful completion of the project.

Special thanks go to Madelyn Olson who typed the final copy.

Sally J. Drew
Task Force Coordinator

INTRODUCTION

A widely accepted principle of librarianship is that cooperation and resource sharing among libraries of all types in an area can contribute substantially to the effectiveness of library services in that area. The Wisconsin Division for Library Services and its advisory body, the Council on Library Development, have been concerned that Wisconsin has not yet developed an adequately articulated program of interlibrary cooperation and resource sharing. As a step toward the evolution of such a plan, the Council appointed the Task Force on Interlibrary Cooperation and Resource Sharing in September of 1975. This task force of some 45 persons was broadly representative of all types of libraries and information services in the state, and it was given somewhat less than a year to complete its work. This volume constitutes the Task Force's report.

The Task Force adopted two overall goals for its work:

1. To ensure Wisconsin citizens the most effective and efficient use of the resources of all Wisconsin libraries by formulating and recommending an action-oriented program for interlibrary cooperation and resource sharing.

2. To ensure that planning for interlibrary cooperation and networking in Wisconsin is done within the context of the work of the National Commission on Libraries and Information Science.

Specific objectives to be achieved in working toward these goals included gathering information on the current status and apparent trends in interlibrary cooperation and resource sharing in Wisconsin and elsewhere, identifying gaps and problems to be dealt with in planning, and making recommendations for future developments.

Various strategies were used by the Task Force in working toward the achievement of its goals. Sally J. Drew, able coordinator of the project, gathered both printed information and survey data. Resource persons from other states shared their insights with the Task Force. And Task Force members spent many hours exchanging ideas, pooling judgments and reaching decisions.

Early in their work the members of the Task Force decided to identify some of the important barriers that would need to be overcome to achieve effective interlibrary cooperation. Barriers identified include legal and political barriers, funding problems, difficulties in communication among libraries and individuals, and psychological reactions by librarians and others to proposals for cooperation and resource sharing. The Task Force also established some criteria and principles that should guide the development of a plan for interlibrary cooperation in the state. For example, the group urged that the plan focus on the library user and aim at convenient access for all residents to Wisconsin's library and information resources. A plan for interlibrary cooperation and resource sharing should build on existing strengths and should be flexible and evolutionary in its design. A structure for interlibrary cooperation and resource sharing for Wisconsin should have wide participation and strong components at the local, area and state levels, and it should have continuous planning and coordination based on wide representation from all types and levels of libraries and information services in the state.

Based on its various deliberations and information gathering activities, the Task Force has made recommendations relating to a structure for planning and implementing interlibrary cooperation and resource sharing. At the state level the Task Force report recommends the establishment of a State Council for Library Development and Networking. This Council would coordinate the planning for and implementation of interlibrary cooperation and resource sharing activities in the state. It would be assisted by a Professional Advisory Committee made up of librarians and information specialists broadly representative of the types of libraries, geographic areas and resource strengths in the state. At the area level the Task Force recommends that there be developed throughout the state Area Multitype Organizations which would plan and coordinate cooperative activities in their respective areas. Funding for the activities of the Area Multitype Organizations should be in addition to other library funding and should not be taken from that presently allocated to other programs, such as state-aided public library systems.

The Task Force also has made some recommendations regarding interlibrary cooperative activities that should receive priority. Interlibrary lending of materials among different types of libraries should be made more effective than it now is. There should be continued development of facilities and procedures for referring reference questions among libraries of different types. The development of union lists of materials of all sorts, as well as other methods of providing bibliographic access to the information resources of the state, should receive intensified attention. Fast, efficient communication among libraries should be developed as a basis for rapid and convenient access to information by the user. For all the foregoing activities, as well as others, the capabilities of new technological developments should be explored and exploited.

The full implementation of the recommendations of the Task Force would require changes in state legislation based on elaboration and refinement of the recommendations. However, much can be done in the interim to build upon and enhance current and developing cooperative activities and to see that they can eventually be fit into an effective statewide pattern. The members of the Task Force hope that their work will contribute to continued progress toward the effective access to the information resources of the state and nation by the citizens of Wisconsin.

Charles A. Bunge
Task Force Chairman

DEFINITIONS

Throughout this report terms are used which may have varying connotations for different readers. To increase consistent understanding, the following terms will be used as described below.

library -	refers to libraries, media centers and information services of all types and sizes
librarian -	refers to a professional employee of any library, media center or information service
public library -	refers to a library that serves free of charge all residents of one or more counties or incorporated municipalities and is supported in whole or in part by tax funds
academic library -	refers to a library or media center maintained by an institution of post-secondary education
school library -	refers to a library or media center maintained by one or more public school districts or other such school governing authority, public or private, for the use primarily of students in elementary or secondary educational programs
special library -	refers to a professional, technical or special-purpose library maintained by a governmental agency, private profit or nonprofit corporation or an institution of higher education
intertype or multitype -	refer to activities, programs or library organizations involving libraries of different types and sizes
local -	refers to the community level
area -	refers to substate geographic regions encompassing a number of communities or counties
state -	refers to Wisconsin geographic boundaries and governmental authorities
regional -	refers to multistate geographic boundaries and governmental authorities

CHAPTER 1

TASK FORCE ORGANIZATION, GOALS AND ACTIVITIES

Organization

The Task Force on Interlibrary Cooperation and Resource Sharing was established by the Division for Library Services in conjunction with the Council on Library Development to investigate present and future developments in cooperative activities among all types of libraries. The project was funded from June 1, 1975 to June 30, 1976 by Title I of the Library Services and Construction Act administered through the Division for Library Services.

Wisconsin librarians were already familiar with the concept of interlibrary cooperation and resource sharing. Many had participated enthusiastically in a variety of innovative and challenging projects and had been exposed to the possibilities inherent in cooperation. The Wisconsin Library Service Record, 1974 described the activities of 20 statewide library networks or planning organizations. Wisconsin, however, has not yet developed a centralized planning agency for cooperative activities among libraries. Future cooperative arrangements will require the use of more sophisticated and costly computer technology, encompass a larger portion of the state's information resources and require a greater amount of energy and expertise from the state's librarians and information specialists. These trends clearly pointed to the need for more coordination of planning and services, and this provided the impetus for the Task Force project.

Charles Bunge, Director of the University of Wisconsin-Madison Library School, served as Task Force chairman, leading the group through many spirited discussion sessions. Sally Drew was hired as project coordinator in September, 1975. The 45 member Task Force was led by a 10 person Steering Committee which provided guidance in formulating goals and objectives, planning meeting activities and periodically evaluating the work of the Task Force. The project coordinator reviewed past literature, prepared background materials, planned and organized Task Force meetings, conducted the research and prepared the final report.

The Task Force members were chosen to be broadly representative of libraries of varying type, size and geographic location. Also represented were library associations or organizations, educators, administrators, a library trustee and other citizens. Many members were familiar with or involved in existing cooperative projects in the state. The Council on Library Development and Division staff selected the Steering Committee members who in turn selected the remaining 35 Task Force members.

Goals and Objectives

The enormity of the job to be undertaken impressed all of the participants as they attempted to define the needs to be met by the project. Task Force members adopted the following goals and objectives at their first meeting, October 31, 1975.

Goals:

1. To ensure Wisconsin citizens the most effective and efficient use of the resources of all Wisconsin libraries by formulating and recommending an action-oriented program for interlibrary cooperation and resource sharing.

2. To ensure that planning for interlibrary cooperation and networking in Wisconsin is done within the context of the work of the National Commission on Libraries and Information Science.

Objectives:

1. To identify and describe existing programs of interlibrary cooperation and resource sharing in Wisconsin, including interlibrary loan programs, intertype library councils, networking activities and other such programs.
    a. To compile and integrate narrative and statistical information that already exists.
    b. to gather additional data as needed.

2. To identify and describe trends that are suggested by policies and practices of the present and recent past (based on the information used to meet objective 1).

3. To identify and analyze programs or proposals for interlibrary cooperation and resource sharing at other levels, including Midwest Region Library Network (MIDLNET) and the National Program for Library and Information Services, for their implications to planning in Wisconsin.

4. To assess the potential for an efficient and effective program of interlibrary cooperation and resource sharing to be found in existing structures such as public library systems, regional intertype library councils, Cooperative Educational Service Agencies (CESAs), etc.

5. Based on the analyses and assessments of objectives two, three and four, to identify gaps and problems in the efficient and effective use of resources that will need to be dealt with in planning.

6. To identify and describe alternative structures and programs that are likely to achieve efficient and effective interlibrary cooperation and resource sharing.

7. To choose and recommend the most feasible alternatives and to integrate the recommendations into an action-oriented plan.

Meetings and Activities

Task Force activities utilized the expertise of all members in a variety of ways. Six full-day meetings allowed members to actively share ideas and opinions, discuss problems and explore numerous alternative solutions. Small group discussion facilitated the flow of communication and ensured that all participants had the opportunity to contribute their ideas. Compilations of the small group findings were given to members following the meetings.

At the first meeting many participants expressed the need for more detailed descriptive and statistical information about present interlibrary cooperation and resource sharing activities in Wisconsin and other states. To meet this initial need, the project coordinator prepared a variety of background materials including a list of acronyms for cooperative organizations and activities, an outline of access for Wisconsin citizens to the state's library resources and descriptive information about library systems and networks in Wisconsin and other states. The coordinator also designed a two-part research project to gather detailed information about cooperative activities and interlibrary loan and reference practices in Wisconsin. A survey was conducted to obtain broad information about present patterns of participation in cooperative activities by all types of libraries. In addition, personnel from 11 libraries agreed to systematically document interlibrary loan and reference activity and performance levels. (A more detailed description of the research project procedures and results is included in Chapter 4 and in the Appendix.)

Creation of a statewide plan for interlibrary cooperation and resource sharing presented a challenge which could not be undertaken in a vacuum. Precise definition of the problems and barriers to be overcome was basic to the solution. December 17, 1975 Task Force members spent the full day in small groups exploring and analyzing the barriers to effective interlibrary cooperation and resource sharing. They listed real and potential barriers and then ranked them according to importance, identifying a number of trouble areas for the Task Force members to consider in later deliberations. (A summary of this discussion is included in Chapter 2.)

The December meeting provided many useful ideas for incorporation into the criteria to be met by a statewide planning effort. To encourage wide discussion of these criteria, work sheets were circulated to each Task Force member. The work sheets outlined suggested criteria, asked for comments and revisions, allowed for additional suggestions and provided a means of ranking the criteria in order of importance. A similar work sheet listed possible activities to be undertaken by the structure outlined in a statewide plan. (A summary of the resulting criteria and activity priorities is included in Chapter 3.)

A number of other states were undertaking similar planning efforts. Nonetheless, few actually had fully operational statewide multitype library systems on which a Wisconsin plan could be patterned. Task Force members were periodically briefed about significant developments. Three librarians from outside Wisconsin attended the meeting February 27, 1976 to describe the activities being conducted in their states. The speakers, William De John (Illinois State Library), Al J. Goldwyn (Case Western Reserve - Graduate Library School, Ohio) and Maryann Duggan (Western Interstate Commission of Higher Education) provided valuable insights into state-level planning processes and alternatives.

After carefully reviewing other statewide programs, the Steering Committee drew up three alternatives which they felt were realistic and workable for Wisconsin. Task Force members met in small groups on April 14, 1976 to discuss the strengths and weaknesses of each alternative. These comments were compiled and returned to each member. The Steering Committee also used them to further refine a single recommended structure. At its subsequent meetings, May 28 and June 25, 1976, the Task Force members debated the details of this plan and formulated further recommendations to be included in the final report.

CHAPTER 2

PROBLEM EXPLORATION

BARRIERS TO INTERLIBRARY COOPERATION

The Task Force on Interlibrary Cooperation and Resource Sharing met December 17, 1975 to identify the barriers to interlibrary cooperation. Meeting in small groups, the members identified many real and potential barriers and ranked them according to importance. The following is a summary discussion of these barriers.

LEGAL AND POLITICAL BARRIERS

Legal barriers fell into two main categories. Existing laws have at times hampered interlibrary cooperation. For example, it is currently questionable whether parochial schools may benefit from cooperative services paid for from public tax funds. The copyright law also has raised many questions concerning the legality of photocopying practices in many library systems or consortia. Lack of legislation in support of networking generally or for specific network structures has impeded library networking.

Frustration was expressed over the complications of dealing with numerous overlapping political jurisdictions on both the local and state level. Differences in roles and governing authorities of various types of libraries have also caused many problems in delineating cooperative activities.

FUNDING BARRIERS

There was a strong consensus that lack of funding presented a barrier to interlibrary cooperation. The aim of cooperative programs is to improve service in a cost-effective manner. The growing supply of available information and greater user demands place increased pressures on all institutions. A library can no longer afford to acquire all the materials it requires to satisfy user needs. The duplication in purchase and storage of materials which results from this practice is sometimes counterproductive. Libraries must rely on the ability to borrow needed but little-used items. Interlibrary loan, is therefore, cost-effective. It is not free, however, and cannot always be absorbed by individual institutions when borrowing and lending become unbalanced. There is presently no consistent provision for reimbursement of services among libraries. Also, the provisions for participation by all types of libraries are uneven. For example, special libraries and libraries in parochial institutions are often excluded from participating in cooperative programs because of legal or philosophical barriers inhibiting funding.

Activities such as interlibrary loan, interlibrary reference and continuing education of librarians contribute to improved service. However, they all require increased staff time which is expensive. Service can be improved with better communication and delivery systems and more efficient means of organizing, storing and retrieving bibliographic information. The computer offers great potential for improving services, but the technological advances necessary to meet library needs require funding for coordinated experimentation and development.

PLANNING BARRIERS

Concern for consistent planning or the lack of it received emphasis. Many comments suggested the need for a coordinated statewide plan which would define the roles of and allow for equal participation by libraries of all types. Several people suggested the need to look carefully at the roles and possible overlapping activities carried out by single type library systems and intertype councils. Also brought out was the desire for more basic information on user needs, cost analysis of interlibrary activities and more review of other library statistics. Everyday problems related to planning and budgeting included inadequate staffing levels and the need for more standardized procedures and regulations.

COMMUNICATION BARRIERS

Many participants said there is generally a lack of knowledge, understanding, commitment or support concerning the concept of cooperation and its benefits. These deficiencies were attributed to a wide range of people, including administrators, legislators, government officials, members of the public and librarians themselves. The implication left is that the benefits of cooperation need to be described more precisely both quantitatively and qualitatively and that more public relations activity should be aimed at all sectors.

The second frequently mentioned communications barrier relates more closely to the everyday activities involved in access to information resources. More efficient communication channels and delivery systems are needed to provide bibliographic and physical access to all types of materials for a wide range of libraries or library systems. Special attention must be directed to the technological aspects of delivery and communications systems.

INFORMATION RESOURCES AND BARRIERS TO THEIR USE

Lack of general knowledge of or bibliographic access to available resources received attention. On the more practical side, many expressed concern over the type and quantity of use of these resources after access was established. Some of these concerns had underlying financial considerations such as insufficient basic collections for a library's own clientele, overuse of collections by outside users, uneven use of large library collections and fear of increased workload. Concern was also expressed over the place of the newer media and technologies in library cooperative plans.

PSYCHOLOGICAL BARRIERS

Some of the items classified as psychological barriers were perhaps more real than others. None were new. Frequently mentioned concerns were loss of autonomy, the threat to independence, the desire for self-sufficiency, inability of people to cope with change and lack of imagination and aggressiveness in pursuing goals.

CHAPTER 3

CRITERIA FOR A STATEWIDE PLAN AND STATEWIDE ACTIVITIES

The magnitude of the endeavor implied in the Task Force goals became increasingly apparent as participants discussed the barriers and problems to be surmounted. Detailed coordination was needed to overcome certain legal barriers, finance cooperative activities in general, work out interloan and reference channels on state and area levels and plan the future development of improved communications systems and the most effective use of new technologies. The participants decided that each of these areas would require concentrated investigation and could not be dealt with in detail by this Task Force. A statewide planning structure was needed to carry out intensive study of these and other individual programs and provide continuous monitoring, evaluation, and building of cooperative library services. Defining the type of organization which could carry out planning and coordination of programs on a continuing basis became the focus of Task Force activities.

Prior to developing an organizational structure, Task Force members listed desirable attributes of the organization and the criteria it should be designed to meet. After studying successful cooperative arrangements in Wisconsin and other states, the Task Force coordinator drew up two sets of work sheets. One listed possible criteria for a successful statewide plan for resource sharing and intertype library cooperation. The other suggested possible activities to be undertaken by the group or groups proposed in the plan. Participants were asked to comment on each item or list additional items and then to rank the top five criteria and activities in order of importance. The results were compiled and returned to the participants. Sample work sheets and a list of the criteria and activities in the order in which they were eventually ranked follow. Thirty-nine Task Force members returned both work sheets.

Work Sheet Tabulation

Task Force members were instructed to choose the five most important items as they perceived them at that time and rank them. A rank of five represented the most important item and a rank of one represented the least important item.

CRITERIA FOR A SUCCESSFUL RESOURCE SHARING AND INTERTYPE LIBRARY SERVICE PLAN

Criteria	Number of People Voting	Total Vote
1. Permits access by all Wisconsin residents to library and information resources through a local outlet	24	86

Criteria	Number of People Voting	Total Vote
2. Makes appropriate use of existing library structures and builds on existing strengths	23	83
3. Encourages participation by any library regardless of type, size or geographic location	18	54
4. Defines clearly the role and responsibility of each type of library, library agency, system, council, network or consortium	17	53
5. Provides a basic statewide structure towards which various library and information services can aim	14	42
6. Promotes greater fiscal support for resource sharing activities among libraries and information services	14	41
7. Provides for continuous planning and monitoring of programs thus permitting growth and change	15	35
8. Sets realistic short-term goals and farsighted long-term goals	11	31
9. Governance incorporates input from individual libraries of various types and sizes and insures geographic representation	11	30
10. Promotes greater legislative recognition of resource sharing activities among libraries and information services	10	26
11. Governance incorporates input from library systems, networks and consortia and insures geographic representation	8	21
12. Proposes appropriate roles and responsibilities for various levels of government (state, area and local)	8	21
13. Coordinates activities with multistate, regional and national plans	8	16

Criteria	Number of People Voting	Total Vote
14. Establishes standards and uniform methods for the use of modern technologies (computers, micrographics, telecommunications, etc.) for adoption by participants as development and funding permit	7	15
15. Accommodates information of all types and in all formats	6	15
16. Provides for continuous user feedback	2	6

STATEWIDE PROGRAMS OR ACTIVITIES

Activity	Number of People Voting	Total Vote
1. Interlibrary loan	24	93
2. Union lists of serials	21	71
3. Reference service	20	62
4. Common statewide communications system for libraries	20	53
5. Information aimed at resource controllers on benefits of resource sharing (legislators, local funding agencies etc.)	11	40
6. Union lists or catalogs of books	15	39
7. Standardized interlibrary loan procedures	9	38
8. Continuing education of library staffs in resource sharing and in the use of extended resources	15	37
9. Improved delivery systems for materials	16	36
10. Continuing education of the public in availability of extended resources	11	26
11. Information aimed at administrators on benefits of resource sharing	6	23
12. Improved statewide communications systems (TWX, Wats-Lines, etc.)	9	23
13. Standardized reference referral procedures	4	17

	Activity	Number of People Voting	Total Vote
14.	Cooperative acquisitions	5	12
15.	Common statewide statistical reporting system	4	12
16.	Cooperative cataloging	4	11
17.	Identify gaps in statewide collections strengths	4	7
18.	Shared storage facility for low use items	3	6
19.	Improved statewide service to users with special needs (handicapped, disadvantaged, institutionalized, etc.)	4	4
20.	State serials bank	1	5
21.	Reciprocal borrowing (direct access)	1	3
22.	Union lists of nonprint materials	0	0
23.	Coordinated access to computerized data bases for subject area information retrieval	0	0

In filling out the criteria work sheets, Task Force members reiterated the first concept set forth in their goals: to provide convenient access for all residents to Wisconsin's library and information resources. To accomplish this, participants expressed a strong preference for building on existing strengths and making maximum use of existing resources. Members wished to design a structure which would be both flexible and evolutionary in its application throughout the state. The structure must have two primary attributes. It must encourage and incorporate participation by all libraries regardless of type, size or geographic location; and it must clearly define the role of each participating library, library agency, system, council, network or consortium.

Four activities were identified as requiring priority statewide attention: interlibrary loan, the development of a union list of serials, interlibrary reference services and the development of a statewide communications system.

CHAPTER 4

RESEARCH PROJECT GENERAL FINDINGS

Wisconsin's information resources are spread among a wide variety of large and small public and private institutions. Each institution has a distinct responsibility for collecting materials and serving a specific group of people. Some collections meet the specialized needs of researchers, while others cater to people's recreational needs. Students in educational programs, from kindergartners to post doctoral candidates, have access to large collections of materials to supplement their studies. In the past, these institutions have existed independently and have attempted to maintain a high degree of self-sufficiency. In our increasingly complex society, however, independence and self-sufficiency have become less practical and more difficult to maintain. Information users have complicated and overlapping needs, and the amount and sophistication of information continues to expand. No institution can begin to meet all the needs of its users and stay within the limits of its purpose and its budget.

To facilitate access to information, libraries, media centers and information services have found it necessary to share materials and cooperate in many other ways. The research project carried out by the Task Force coordinator was designed to determine some of the strengths of Wisconsin information resources and the extent to which institutions are cooperating to expand access to these resources. A survey was conducted to obtain general information on participation in cooperative activities with emphasis on procedures and patterns for referral of interlibrary loan and reference requests. To provide more detailed supplementary information, 11 libraries agreed to document interlibrary loan and reference activities. While generalizations could not be made from the activities of these individual institutions to the activities of all libraries in the state, these libraries were chosen because it was hoped they could provide illustrative information to supplement that obtained through the survey. The types of libraries which served as case studies are listed below as they are referred to in the rest of this report.

Library A - Public Library System Headquarters
Library B - Public Library (non-system)
Library C - Public Library (non-system)
Library D - Corporate Library
Library E - Corporate Library
Library F - Special Library (dealing with archival material)
Library G - Public Four-Year University Library
Library H - Private College Library
Library I - Private University Library
Library J - Private High School Library
Library K - School District Library

(Detailed explanations of procedures for each part of the research project and all statistical charts are included in the appendices.)

COLLECTION STRENGTHS IN MATERIALS

Wisconsin libraries, media centers and information services oversee information resources in many forms including books, documents, technical reports, periodicals, audiovisual materials and computerized information. While each may emphasize one form or another, most, whether large or small, house a variety of materials. The survey showed concentrations of certain types of materials.

Book collection sizes varied from less than 1,000 (with a few libraries having no books) to over 900,000. Most of the book collections over 101,000 (85%) were in academic or public libraries. While a few special libraries had large book collections, most special and school libraries had 20,000 books or less. Special and academic libraries had the strongest concentration of periodical titles with 32 libraries currently receiving 600 or more periodical titles. Most public (89%) and school (98%) libraries received less than 200 periodical titles. An approximately equal number of public, academic and school libraries had large collections (over 5,100) of audiovisual materials. Of the libraries providing information on audiovisual material collection size, 86% of the special libraries and 78% of the public libraries had less than 700 items. Seventy-four percent of both school and academic libraries had collections over 700 items. School and academic libraries appeared to have strong audiovisual collections.

Little can be learned by comparing circulation statistics since a large number of libraries apparently did not keep them. Only 56% of the special libraries and 62% of the school libraries answered this question. The largest amount of lending to library users appeared to be taking place in academic and public libraries, but further statistics collection could change this picture. Furthermore, on-site library use, which may be substantial in any library, is not reflected in circulation statistics. Some libraries never circulate materials.

Staff size variations were not related to type of library. The majority (57%) of the libraries providing staffing information operated with from two to three staff members. Academic libraries had the highest percentage (34%) of libraries with over ten staff members.

PRIMARY CLIENTELE OF LIBRARIES

Libraries are organized and funded for a distinct purpose and usually serve the needs of one or two specific groups of users. Some libraries are more liberal in allowing outsiders to use their collections than others. Three questions on the survey were designed to gather information on access patterns by various user groups. The survey first asked librarians to list the user groups whom they consider part of their primary clientele, that is, those whom they have a legal or organizational responsibility to serve or those whom they do in practice frequently serve. They were then asked to identify other user groups who sometimes use the library, describe the type of service provided, on-site use and/or direct loan, and estimate the frequency of use. All of these figures are quantitative and do not reflect the quality of services received by any user group.

Elementary school libraries and public libraries provide the major source of materials for elementary school students. Eighty-four percent of the public libraries listed elementary school students as part of their primary clientele or indicated that they provided direct loan services. Seventy-five secondary schools either listed elementary school students as primary clientele or allowed direct loan. These students also have direct access to approximately 75 special or academic libraries. Thirty-two libraries indicated that they refused or discouraged loaning materials to elementary school students.

Secondary students also appeared to make use of the public library as well as their school libraries. A few special and academic libraries listed secondary school students as primary clientele, and many more allowed on-site use.

University, college and vocational/technical school students have fairly wide access to libraries of all types. Forty-six percent of special libraries listed them as primary clientele. Another nine percent allowed direct loan of materials, and 31 percent provided on-site use.

Teachers at all levels and research staff also have varied access to library resources. Eighty-three percent of the academic and vocational/technical school libraries, 39% of the special libraries, 70% of the school libraries and 27% of the public libraries listed them as primary clientele. Many other special and public libraries provided on-site use and/or direct loan of materials.

Professionals from specific fields have somewhat more restricted sources of information. Medical professionals appear to have the largest number of sources available to them. They are chiefly served by special libraries within their field, but have access to some public, academic and other special libraries. Twenty-six percent of the special libraries and 11% of the academic and public libraries listed business and industry professionals as members of their primary clientele. Many other special, academic and public libraries also allowed direct loan or on-site use. Government officials and legal professionals have fewer special libraries at their disposal than either business, industrial or medical professionals and have slightly less access to resources in other types of libraries.

The public library provides the major source of direct access to the general public. Less than 10% of special, academic and school libraries listed the general public as their primary clientele. About one-half of the academic libraries provided on-site use and direct loan to members of the general public. A substantial number of special and secondary school libraries indicated they allowed on-site use of their resources.

In general, libraries serving users whom they do not consider part of their primary clientele do not appear to serve such users frequently. In estimating direct library use by outside users, most librarians placed this level of use at from 1 to 25 times per month.

PARTICIPATION IN COOPERATIVE SYSTEMS

A sizable majority of libraries (70%) participated on a formal basis in some type of cooperative system. Different types of cooperatives have been organized to meet library needs.

Public Library Systems

One hundred forty-eight or 52% of the public libraries answering the questionnaire belonged to public library systems. This corresponded closely to the latest figure (54%) from the Division for Library Services. These libraries serve 64% of the population. Formal participation in systems was not limited to public libraries, however. Forty-nine school, academic and special libraries indicated that they had formal contracts with public library systems. Participation by other than public libraries comprises one-fourth of the current formal participation in public library system activities.

Legally Incorporated Intertype Library Councils

The intertype council has been the focus of cooperation among different types of libraries in many areas. Nineteen percent of the libraries answering the questionnaire participated in the four legally incorporated intertype councils, Madison Area Library Council (MALC), Library Council of Metropolitan Milwaukee (LCOMM), Northeast Wisconsin Intertype Libraries (NEWIL) and Tri-County Library Council (TLC). Directories for these intertype library councils record a membership of approximately 250 libraries. This membership includes the state's three largest academic libraries and the state's two largest public libraries with combined holdings of almost seven million volumes. Special libraries comprised 42% of this membership (29% of the special libraries answering the questionnaire). Two intertype councils, MALC and LCOMM, developed in areas with high concentrations of special libraries. Nearly one-half (47%) of the academic libraries answering the questionnaire belonged to intertype councils. The proportion of school (12%) and public (10%) libraries belonging was much smaller.

Wisconsin Health Science Library Network

As might be expected, special libraries comprised the majority of members (81%). Thirteen public, academic and school libraries also indicated that they had formal contractual arrangements with the Wisconsin Health Science Library Network.

Cooperative Educational Service Agency (CESA)

School libraries made up the majority of libraries contracting with CESAs. This is not surprising as CESA services are currently aimed primarily at schools and are available by contract.

Non-Participating Libraries

Thirty percent of the libraries answering the questionnaire indicated that they did not belong to or contract on a formal basis with any library system, network or consortium. The majority of these libraries were either school (48%) or special (64%) libraries.

PARTICIPATION IN COOPERATIVE ACTIVITIES

In recording participation in cooperative activities respondents were asked to check activities engaged in or contracted for on an informal as well as formal basis. As might be expected, fewer libraries (25%) show lack of participation in any cooperative activities compared to participation in formal systems (30%).

Activities which involve providing information directly to library users were most popular. Interlibrary loan, sending items in response to a specific author/title request, was the most frequently cited activity with 61% of all libraries participating. A slightly greater percentage of academic libraries (81%) engaged in interlibrary loan than did public (78%) or special libraries (60%), with school libraries (41%) showing the lowest level of activity. Forty-one percent of the libraries utilized interlibrary reference which involves obtaining information from another library for a user. Thirty-two percent honored reciprocal borrowing, allowing a user who has a borrowing card from one institution to check out materials directly from another institution from which the user has no card. Reciprocal borrowing is often offered as a service in single-type library systems, although some also takes place between different types of libraries. NEWIL and LCOMM have courtesy card systems which encourage reciprocal borrowing. Several of the academic libraries which took part in the case studies allowed members of the general public to check out materials directly. In response to several survey questions many libraries indicated a preference for utilizing interlibrary loan channels when dealing with requests from users outside their primary clientele.

Fewer libraries participated in cooperative activities relating to the selection, purchasing, cataloging and processing of library materials. Public libraries engaged in this type of cooperative activity most frequently.

Special and public libraries participated more often in activities involving publicity, consulting and continuing education. This could be due to emphasis on these activities within the Wisconsin Health Science Library Network and public library systems.

Only 14% of all libraries utilized cooperative delivery services for transferring materials from one library to another. Since a much larger proportion engaged in interlibrary loan, they were probably using more conventional means of delivery. This will be investigated in more detail later.

Interlibrary Loan

The survey provided a great deal of information about the loaning and borrowing of materials between libraries. However, this information does not give a completely accurate picture of interlibrary loan activity because some libraries reported that they did not keep interlibrary loan statistics. More libraries reported statistics for items borrowed than for items loaned. In the process of spot-checking loan statistics against other records available from the Division for Library Services, a number of inaccuracies surfaced. The statistics for items borrowed appeared to give a more accurate picture of interlibrary loan activity than items loaned. Therefore, cross tabulations requiring numerical calculations were based on statistics for items borrowed.

It is difficult to determine what effect unreported statistics would have on total calculations. In response to survey question nine, 61% of all libraries reported engaging in interlibrary loan as a cooperative activity. Fifty-eight percent of all libraries reported borrowing items from other libraries. A larger portion of school and special libraries did not report interloan statistics. The missing school libraries might not affect total figures much because the majority only reported borrowing ten items or less per year. The absence of statistics from special libraries could affect total figures more.

Level of Interlibrary Loan Activity in Wisconsin

Although a majority of libraries engage in interlibrary loan, the actual amount of interloan traffic has only been estimated in the past. The figures collected in the survey showed that 494 libraries borrowed approximately 210,000 items in 1975. This represents a 135% increase over the approximately 89,900 borrowed in 1970.

A number of libraries loaned more than they borrowed. The main library and several special libraries on the University of Wisconsin-Madison campus were heavy lenders. Some traffic was funneled through Wisconsin Interlibrary Loan Service (WILS) and some directly through each library's interloan department. Seven public libraries also loaned roughly twice as many items as they borrowed. Borrowing appeared to be spread more evenly than loaning, as fewer libraries reported borrowing in the largest categories. School library collections appeared to be least utilized for interlibrary loan. They loaned and borrowed materials at a lower rate than other types of libraries. Of the 108 schools which reported borrowing materials, 65% borrowed less than ten items a year. Eighty-nine percent loaned less than ten items per year.

Interlibrary Loan Patterns Among Libraries

Subsequent survey questions and the use of case studies were designed to find out who borrows from whom and what determines these patterns. The case studies showed that where formal contracts or long-established practices existed, these channels were followed almost exclusively. Libraries G, H and I, all college or university libraries, had formal contracts with WILS and referred nearly all of their requests there. Libraries A, a public library system headquarters, and B, a non-system library, utilized some local resources to fill about one-third of their requests before referring them to the Reference and Loan Library. Library C, another non-system library, sent most of its requests directly to the Reference and Loan Library. Corporate libraries D and E frequently utilized the services of the Wisconsin Information Services Division in Madison. Libraries C, E and J, (a private high school library), used the largest variety of sources in attempting to fill requests. When contacted later, librarians at C and J said that local or out-of-state union lists were used to locate the materials. The librarian at corporate library E worked within a narrower subject area than the others, was aware of likely sources, and referred requests anywhere the information might be obtained.

The survey questionnaire showed broader patterns than the case studies because many more libraries contributed information. Survey question 17 asked for an estimate of the number of items borrowed per month from a variety of sources. These findings are discussed in the following paragraphs.

WILS is funded by user fees from 47 academic libraries and a state contract to provide backup service for the Reference and Loan Library. Participating academic libraries sent most of their requests directly to WILS. Question eight provided some insight into indirect library use of WILS, as libraries other than those which contract directly indicated use of the service. This indirect use showed an even spread among types of libraries: public 35%, school 18%, special 18% and academic 29%.

The Reference and Loan Library serves public libraries and library systems, institution libraries and some special and school libraries. It also directly serves individuals in the state who do not have legal access to a local public library. Public libraries and systems were the largest users of the Reference and Loan Library. However, 46 special libraries estimated borrowing from 1 to 250 items per month and 50 secondary schools estimated borrowing from 1 to 50 items per month. Academic, vocational/technical school libraries and elementary school libraries estimated less frequent use. Much the same patterns existed in borrowing from public library systems. More elementary school libraries and academic libraries reported utilizing local public libraries than they did public library system headquarters or the Reference and Loan Library.

Use of university and college libraries was evenly spread; about one-half of the academic libraries indicated borrowing from each other. Special library use of academic libraries was relatively heavy with 42% of the special libraries reporting estimated borrowing from this source. Most borrowing from academic libraries by all other types of libraries fell into the 1 to 100 items a month range.

Special libraries were the heaviest users of other special libraries. Use by other types of libraries appeared sparse. Special libraries seem to have been more creative in utilizing the resources of other libraries than other libraries have been in using special library collections.

School libraries, school district libraries and CESA libraries showed little use by other libraries. Although schools may have similar needs it is doubtful that their collections totally duplicate each other; yet only thirty-nine percent reported borrowing from each other. CESA and school district library media centers are not established in all areas of the state; therefore, many libraries do not have access to them.

Interlibrary Loan of Materials

Because different types of libraries have varying needs, interlibrary loan activity involves a wide range of materials. The case studies provided some insight into these differing needs. All types of libraries showed a need for acquiring book and periodical materials which they did not own. However, the proportion of requests for each differed considerably for the academic, school and public libraries. The academic and school libraries serving as case studies requested periodical articles an average of 90% of the time. Public libraries showed a greater need for books which encompassed an average of 70% of their requests. The remaining 30% included requests for periodical articles, microfilm (mostly of old newspapers) and audiovisual materials. Libraries of all types requested materials published in the 1960s and 1970s more often than materials published in earlier periods. Requests for materials from the early 1900s and before were more frequent than requests for material published between 1910 and 1940.

Some libraries had difficulty obtaining certain materials. Technical reports, government documents, periodical articles, films and video cassettes were most frequently mentioned. The few subject areas which caused problems included science and technology, genealogy, education, law and medicine. An analysis of unfilled requests for case study library A and WILS indicated that many items which were not obtainable through interlibrary loan were published by small publishers.

Acceptance of Interlibrary Loan Requests

Librarians vary in their willingness to accept certain types of requests. A request for materials is considerably easier to fill if it includes full bibliographic information and has been verified in a reliable source. Unverified requests often require great time and effort to identify and fill. Approximately one-half (53%) of the libraries surveyed indicated their willingness to attempt to fill verified author/title requests. A lesser percentage (36%) were willing to accept unverified requests and provide the necessary time and skill to verify them.

Interloan of Audiovisual Materials

The loaning of audiovisual materials between libraries has often been a source of contention. Handling and delivery of records, films and other materials has raised technical problems. However, the libraries surveyed generally expressed a willingness to lend these materials. Only 10% indicated that they would not loan audiovisual materials. Thirty-eight percent expressed a preference for lending by special arrangement with the possibility of a shortened loan period. These arrangements probably varied according to the type of audiovisual material or the type of library receiving the loan. One third (33%) of the libraries said they had no restrictions on loaning or would loan for the regular time period. These responses reflected general attitudes and did not differentiate between lending different types of materials to different types of libraries.

Library Characteristics and the Quantity of Interlibrary Loan

Many people have speculated on the relationship of certain library characteristics such as collection size, budget and staffing to the amount of interlibrary loan activity. For example, hypotheses are offered on both sides concerning collection size and borrowing of books. Some express the opinion that small libraries need outside access to more materials than large ones due to the limitations of their own collections. Others hypothesize that large libraries try to meet many urgent needs and will borrow a great many books despite the size of their collections. Others feel that once the channels are open and access is made easier, libraries of all types will borrow more materials. These relationships are very difficult to pinpoint because so many variables are involved. Some variables are virtually unmeasurable in this type of study. For example, some librarians have expressed the opinion that the only important variable is the personality of the librarian dealing directly with the user. Data from the survey questionnaire were used to attempt to point out some of the possible relationships.

The figures for book, periodical and audiovisual material collection size were cross-tabulated with the number of items borrowed. There is some evidence that quantity of interlibrary loan does vary with collection size. The relationships showed most clearly when comparing the libraries at either end of the spectrum. Of the 40 libraries with book collections under one thousand, 88% borrowed less than ten items per year. For those with collections between one thousand and nine thousand, 88% borrowed up to 360 items per year. Libraries with collections between 9,000 and 101,000 showed less discernible patterns. However, of the 28 libraries with collections over 101,000, one third borrowed over 1,000 items per week. The borrowing of periodical articles showed the same pattern. Sixty-six of those libraries which currently receive less than 100 periodical subscriptions borrowed less than 360 items per year. All but one of the 27 libraries subscribing to more than 600 periodical titles borrowed more than 360 items per year. Borrowing of audiovisual materials seems to have little relationship to size.

Relating a non-quantitative measure of interloan activity with a quantitative measure of collection size for books, periodicals and audiovisual materials showed a similar relationship. The libraries indicating that they engaged in interlibrary loan (survey question 9) were broken down by collection size. The percentage of libraries in each collection size category which engaged in interlibrary loan increased as the collection size increased. For example, four percent of libraries with book collections under 1,000 engaged in interlibrary loan while 92% of the libraries with collection size over 101,000 engaged in interlibrary loan. The percentages varied inversely for those libraries which did not engage in any cooperative activities. Generally, the percentage of libraries not involved in cooperative activities decreased as collection size increased.

Similar relationships were shown when comparing staff size and circulation size to interloan activity. Material collection size, staff size and circulation size all indicate the general size of a library operation. Interloan appears, therefore, to be related to size of operation with the large libraries engaging in interloan more frequently than small libraries. This could be due to a number of factors such as wider or more sophisticated demands for services, better bibliographic tools, better trained staff and longer exposure or experience with interloan arrangements.

Utilization of Union Lists

The survey and case studies showed that many libraries borrowed most frequently from libraries or services designated for centralized backup or from other single libraries with large collections. In many cases these collections may be the only source for the materials requested. In other instances, however, the materials may also be available from other local or area libraries. Without a means of identifying collection holdings, these local or area resources may remain untapped because of the complexity of routing requests. Union lists of various types of materials encourage borrowing from a greater range of sources which results in a more even utilization of statewide resources.

The development of union lists has been uneven in Wisconsin. There is no statewide union list of books, periodicals or audiovisual materials which incorporates the holdings of several types of libraries. Union lists of periodicals for single-type library systems such as the University of Wisconsin system and the Health Science Library Network provide information of statewide significance. Intertype library councils have emphasized the creation of area union lists for serials and in a few instances, audiovisual materials. Some lists of book materials for single libraries or library systems are available. Serial union lists are more widely available than other types, and the survey directed its questions to their use.

The survey showed that 53% of the libraries returning questionnaires did not hold any type of union list of periodicals in their collections. Public (56%) and school (70%) libraries most frequently reported this to be the case. It is possible that libraries without union lists obtain access indirectly by referring requests to libraries which do hold union lists. An attempt was made to determine how useful Wisconsin librarians would find a statewide union list of periodicals. Many librarians (22%) had no opinion, which could reflect the inability of those without union lists to form a judgment on this issue. Forty-five percent said a statewide serials list would be either useful or very useful. The estimate of usefulness appeared to be influenced by amount of interlibrary loan. The more items a library borrowed, the more likely the librarian was to say the union list of serials would be useful or very useful. For libraries borrowing 2,000 or more items, 70% of the librarians estimated that a statewide union list of serials would be useful or very useful. Libraries borrowing less than 100 items per year were more likely to rate the union list as not useful or to have no opinion. Estimate of usefulness also varied by type of library with 83% of the academic and vocational/technical school librarians and 52% of the special librarians rating it useful or very useful. A smaller percentage of public (38%) and school (40%) librarians gave it a positive rating.

Interlibrary Reference

Reference referral and interlibrary loan are closely related activities which exist on a spectrum of complexity. Both stem from the need for information which may not be available in an individual library. The simplest interlibrary loan transaction may result from a straightforward author/title request for which all bibliographic information is known. Missing or inaccurate bibliographic information make a request difficult or impossible to fill, and further checking is usually required. In other cases, general information is needed on a broad topic, and the requesting library does not want to limit its options by requesting only a few titles when others would be equally acceptable. A request of this type is often referred to as a subject request. At the far end of the spectrum is the request for a specific piece of factual information or the collection of a variety of facts to answer a question. This may result in the interloan of a book or periodical, but more frequently involves the transmission of the precise piece or pieces of information by telephone, teletype or mail. Another facet of reference work involves the compiling of bibliographies. In this case lending or borrowing of materials may not result. The information concerning interlibrary reference gathered by the survey refers to all reference activities except the interlibrary loan of materials in response to specific author/title requests.

The survey and case studies showed that reference referral was not as prevalent as interlibrary loan. Sixty-one percent of the libraries participated in interlibrary loan while only 41% referred reference requests. Few of the case study libraries referred either subject or other reference requests during the study period. The actual quantity of interlibrary loan was also much greater. Many librarians indicated borrowing between 1-50 items a month through interlibrary loan while most said they referred reference questions at the rate of several times a month or more often only several times a year.

Special libraries appeared to make the most use of reference request referral with 42% contacting other special libraries, 52% contacting academic libraries, 66% contacting either public libraries or the Reference and Loan Library and 28% contacting government offices. Academic libraries contacted a variety of other libraries, but utilized other academic libraries (58%) the most. Public libraries showed limited use of academic libraries (11%), special libraries (7%) and government offices (10%). Few other libraries referred requests to school libraries, but 47% of the school libraries indicated contact with each other.

Acceptance of Reference Requests

As described earlier, reference work encompasses a wide range of activities. Policy concerning acceptance of certain types of reference questions from other libraries varied from library to library. Librarians were more willing to work on simple fact questions (51%) and subject requests (40%) and less willing to tackle complex reference questions (18%) or to compile bibliographies (15%).

Reference Question Referral

There are several methods of handling the situation which arises when the information a user needs cannot be found in the materials available in an individual library. The librarian may suggest that the patron try another library or other source. This type of referral may provide very satisfactory results if the librarian knows the material is available through the other source. If, however, it is a "guess" referral, the user may be simply shuffled from place to place with no success. To ensure success the librarian can take other steps by calling the library or source in question, verifying that help will be forthcoming and making arrangements for the user to use the other library or information source. In some situations the librarian can obtain the information directly for the user.

When asked which one action they took most frequently the librarians answering the survey said they most often referred the user to another library (32%) or obtained the information for the user from another library (42%). Special, academic and school librarians took these actions in nearly equal proportions. Public librarians, however, said they obtained the information for the user four times as often as they referred the user to another library or information source. Though few librarians referred the user or obtained information from a nonlibrary source as an initial preferred action, special libraries did this more frequently than the others. Three percent of the librarians took no action, telling the user that they could provide no further help.

Staffing Levels for Reference Service

One-half of the libraries reported having a librarian available all hours the library was open. School (55%) and public (59%) libraries reported this situation most frequently. Academic libraries, which are often open more hours than other libraries, most frequently reported utilizing a combination of librarian and nonlibrarian staff members to handle reference work. Special libraries represented the largest portion (48%) of those libraries either having staff available less than one-half of the time the library was open or having no staff available.

Computerized Information Retrieval

Only 15% of the librarians surveyed indicated a willingness to compile bibliographies in response to questions referred from other libraries. While their willingness to do this for their own users may be greater, bibliography compilation does not appear to be a popular reference activity. Manual searching is a time-consuming and, therefore, expensive operation and is often left to the user. Computerized searching of bibliographic data bases has greatly reduced the time involved and can produce excellent results, but it does not always alleviate the cost problem. Yet it shows great future potential for extending the librarians part in this area of reference work.

A recently published booklet, A Survey of Machine-Readable Bibliographic and Numerical Data Bases and Related Services in Wisconsin shows the large variety of services which are located in Wisconsin libraries. The survey attempted to determine how many libraries have some kind of access to these data bases. A higher percentage of special and academic libraries reported access, with a majority reporting a charge for the service. The data bases mentioned most frequently by librarians were Educational Resources Information Center (ERIC) and MEDLARS, Medical Literature Analysis and Retrieval System, on line (MEDLINE). The librarians who reported having no access to computerized information retrieval were asked to estimate how useful the service would be to them if it were available. Only three percent estimated the service would be very useful and 17% said it would be useful. The technology is changing very rapidly in this field. This estimate might well change quite drastically with a greater degree of knowledge about the potential of the services.

Use of the Computer for Library Operations

The application of computer technology to library operations is rapidly developing. Librarians surveyed were asked whether they currently utilized or planned to utilize the computer for any library operations within the next five years. Only a small percentage indicated usage for any type of operations. The most frequently cited uses included information retrieval from commercial data bases, cataloging and bibliographic control of materials. Circulation and acquisition were also mentioned a number of times. Special and academic libraries showed the greatest current or planned use in all areas except circulation where public libraries also showed a strong interest.

Communications Systems

Lack of fast, efficient communication links between libraries has hampered resource sharing. The survey questionnaire showed that 45% of the libraries sent requests through the mail frequently and 17% used it occasionally. Only 11% reported using teletype equipment. Teletype connections tend to exist primarily within single-type library cooperatives. For example, some public libraries use teletype to communicate with system headquarters and the Reference and Loan Library, while academic libraries communicate with WILS in this manner. With a few exceptions, there seems to be little use of teletype for intertype library communication. The survey showed a higher proportion of academic libraries used teletype than any other type of library.

The telephone is used by many librarians. Twenty-three percent of those surveyed used local telephones occasionally and 38% used them frequently. However, not all librarians can take such an everyday item as the telephone for granted. Some school, public and special librarians, for example, do not have a phone or convenient access to one. Long-distance telephone use is less, but 37% of the librarians used it frequently or occasionally. The telephone in general is most effectively used to request single items or to refer reference question. Transmitting long lists of materials for interlibrary loan often results in errors and ties up telephone lines excessively. Frequent use of long-distance telephone is costly, and few libraries can budget for an unknown level of use. The Dial Access Intercity Network (DAIN) line has improved access for libraries able to use it.

A number of libraries listed variations of these and other forms of communication. Among these were personal or face-to-face communication and intersystem or interdepartmental mail and delivery systems as distinguished from U. S. mail service.

Delivery Systems

Mail is also the most frequently used means of delivering materials between libraries with 37% using it frequently and 15% using it occasionally. Libraries of all kinds reported using a special purpose delivery van or truck to transport materials, but few used commercial bus service. Libraries of all types indicated that they sometimes sent a personal messenger to deliver materials, most doing this occasionally or rarely.

CHAPTER 5

PRINCIPLES AND RATIONALE OF INTERLIBRARY COOPERATION

During the many discussion sessions of the Task Force and its Steering Committee, basic philosophical concerns and issues continually emerged. This section examines those broad principles which should underlie any structure for interlibrary cooperation and resource sharing in Wisconsin. The discussion of these issues may prove helpful in analyzing the alternative structures in the following sections.

Focus on the Library User

The ultimate beneficiary of any successful plan for coordinating library services and sharing resources will be the library user, whether a member of the general public, a student at any level, a researcher or professional or nonprofessional worker in the public or private sector. People have extremely diverse information needs, and many levels of library, media and information services are necessary to meet them. The ideal information service provides the easiest access to materials in the most efficient and cost-effective manner. This requires balancing ease of access and duplication of materials at many outlets. Over the years libraries, media centers and information services have developed independently to serve the needs of diverse user groups. Service policies have often restricted use of resources to specific users. However, there is a need to balance these sometimes necessary protective policies against the need for the widest use of all resources. The subtleties of these policies and the distinctions between types of library services are often confusing to the user.

Ease of access for the library user to Wisconsin's information resources should continue to be the primary focus of all statewide planning for interlibrary cooperative and networking services.

Importance of Basic Library Services

The growth and development of different types of libraries to meet distinct information needs has and will continue to be extremely important. No one type of service can meet all the needs of even a very small community, nor would it be desirable to attempt to set up one service to do so. Specialized collections and trained staff are necessary to back up the work of students, teachers, researchers, scientists and other professionals and to meet the needs of the handicapped, disadvantaged and other special groups. People also have widely divergent personal and recreational interests.

Any effort at cooperation and resource sharing cannot succeed unless it is built upon strong and well-developed components. Combining strengths of diverse libraries will lead to greater efficiency and ease of access. Combining their weaknesses will prove neither cost-effective nor efficient in improving services. For example, the most sophisticated communication and delivery system will accomplish little if the necessary materials and staff are not available.

Any state or area program of library cooperation and resource sharing should be built on sound planning and support of the basic development of individual libraries, media centers and information services. No plan should impede the development of basic library collections and services for municipalities, larger geographic areas, educational institutions at all levels or nonprofit and corporate institutions.

Importance of Interlibrary Cooperation

Services can be improved further by cooperation among libraries once the basic services for the general public, students in elementary schools, middle or junior and senior high schools, vocational/technical schools, colleges and universities and those citizens in government or private business and industry with specialized needs have been developed. Cooperation can and should take place at all levels, within the local community, among communities and institutions at the area level, from the state level and among states through regional interstate organizations. These efforts should be designed to mesh as easily as possible with the emerging national network.

Cooperation should not be limited to large or specialized institutions. All libraries can contribute to the whole and each must be willing to furnish energy and resources as well as receive. Full utilization of the resources at each level before referral to a higher level will help balance the use and increase knowledge of all information resources within the state.

Cooperation should be encouraged at several levels, the local community level, the area level, the state level, the regional interstate level and the national level. Activities and services most appropriately handled at each level should be defined. Once this is accomplished, the use of resources at each level should be exhausted before the resources at a subsequent level are utilized.

Wide Representation in Coordination of Cooperative Services

The original grant for the Task Force on Interlibrary Cooperation and Resource Sharing emphasized participation by librarians from all types of libraries. A planning effort of this type required wide-ranging input. Continued planning will require the same kind of input to insure that cooperative services are responsive to the librarians utilizing them and to the library user.

All libraries, regardless of type, size or geographic representation should participate in coordination of cooperative and networking services.

Forming a Unified Focus

To meet increasing user needs, a variety of single and multitype library systems have emerged. The experiences of multitype organizations have especially demonstrated the importance of equal input from and governance by all types of libraries and library systems and have pointed out the sometimes difficult arrangements necessary to balance the interests of all parties. Librarians in Wisconsin and in other parts of the country have been tempted to form separate systems for multitype library cooperative activities. This may be necessary to a point, but total separation from other types of libraries and systems also has its disadvantages. The library user and taxpayer may not understand the reasons behind this separation. Cooperative services are likely to receive the most support if they are, in the public's view, as closely tied to basic services as possible. Requests for funding may be viewed with sympathy if they are presented as a cost-effective extension of library services rather than as a new and possibly duplicative or competitive library program.

A statewide plan should attempt to provide a unified focus for libraries in planning priorities, policies and programs for interlibrary cooperation and for seeking the funding necessary to implement them while trying to balance all library interests.

State-Level Coordination

Abundant evidence of enthusiasm for interlibrary cooperation programs exists in Wisconsin. As needs have arisen, librarians have attempted to meet them with ad hoc or formal contractual arrangements. Task Force members, however, repeatedly emphasized the need for greater coordination.

Presently there is no state-level coordinating body for networking activities. Public libraries, academic libraries, medical libraries and school libraries provide some services within single-type network structures with a minimal level of state influence. The development of both single and multitype cooperative activities is, however, uneven geographically within the state.

A number of needs require state-level coordination of networking activities. There is a need to present a united front for budget requests. To make the best use of the state's diverse resources requires considerable coordination. New technologies, in utilizing computers for cataloging, materials acquisition, interlibrary loan, circulation, information retrieval and other library applications will require considerable financial backing and should be undertaken with the widest view to overall use. Backup services in the areas of interlibrary loan and reference can be most efficiently coordinated at the state level. Coordination can help insure balanced development of services and programs on an area level throughout the state and avoid duplication of materials and services.

A state-level coordinating body with broad influence in planning and implementing statewide programs and policies involving cooperative arrangements and projects among all types of libraries should be organized in Wisconsin.

Area-Level Coordination

While state-level coordination appears necessary to maximize the effectiveness of certain backup services and the development of expensive technological operations, other activities are more appropriately organized on an area basis. Development of local union lists, communication and delivery systems, inservice training and staff development, and publicity and public relations, for example, are most effectively organized on an area basis. Task Force members agreed that local and area resources should be tapped before utilizing state-level resources.

Wisconsin has widely varied population patterns. Some areas are rural and others have large concentrations of population. Librarians in different geographic areas must have the flexibility to determine the most effective resource sharing patterns for each area.

Libraries in Wisconsin should be organized at the area level to plan, organize and implement area cooperative programs among all types of libraries.

Utilization of Existing Structures

Because constructive efforts at planning and implementing cooperative programs have been initiated at both the state and area levels, existing operating programs and structures should be analyzed and, when appropriate, utilized in the design of a statewide plan.

Several structures offer possibilities at the area level. School, public and health science libraries have active area single-type library systems in many parts of the state. The amount and quality of cooperation may vary, but the framework for activity development is available in most areas via CESAs, public library systems, and the Health Science Library Network. Multitype library cooperation is active in other portions of the state through the four intertype councils, LCOMM, TLC, NEWIL and MALC and within the Southwest Wisconsin Library System. In many cases these area structures overlap. None are exactly coterminous.

To design an area system around all of these might well be impossible. Regardless of which structure receives emphasis in plan design or utilization of boundaries, however, a special effort should be made to coordinate activities among all of them.

At the state level Wisconsin, along with many other states, does not have a comprehensive department of education or board of regents responsible for planning and leadership for all levels of educational programs. The Department of Public Instruction has responsibility for school and public libraries, the State Board of Vocational, Technical and Adult Education for vocational/technical school libraries and the University Board of Regents for libraries in institutions for public higher education. No state agency or board has any specific responsibilities for nonpublic school and academic libraries or special libraries in business and industry.

Three state-level organizations have dealt with cooperative library programs. The statutory Council on Library Development (COLD) was created to provide input to the State Superintendent of Public Instruction on the state's programs for library development and interlibrary cooperation. The Division for Library Services (DLS) is given responsibility for interlibrary cooperation in both the Wisconsin Library Law and in the Administrative Code. The Council on Wisconsin Librarians (COWL) has initiated several cooperative programs for academic libraries and has recently expanded its focus to include participation by other types of institutions for specific projects.

The above organizations have all been involved in interlibrary cooperation to some degree. Yet the enumeration of these groups demonstrates the lack of a logical single base for comprehensive state-level planning and leadership. The strengths and weaknesses of each group will be discussed further in a later section of the report.

A statewide plan for cooperation and resource sharing should build on existing strengths and utilize existing agencies, library and information services and library networks.

Governance of Cooperative Activities

The importance of input from libraries of all types in the planning stages was underscored earlier. It is equally important to incorporate representation from all types of libraries in the governance of any structure having authority over interlibrary cooperation and networking.

Governance at state and area levels should incorporate input and guarantee representation from all types of libraries, library networks, systems, councils or consortia. No one type of library or library network should dominate the structure for planning and implementing intertype activities.

Evolutionary Framework

No one existing structure currently fits all the desired criteria and completely covers the state geographically. Therefore, utilization of existing structures could leave gaps in services and geographic coverage inherent in this approach. Implementation of any plan would require time and would be somewhat evolutionary. This may be especially true at the area level.

A statewide structure should outline a framework within which all areas of the state can coordinate planning efforts. Growth of area intertype networks should be evolutionary, and interim mechanisms for services should be made available during developmental stages of its eventual components.

Legislative Recognition

The concept of cooperation among different types of libraries has been the subject of debate for years. Only recently has action accompanied dialogue. There are numerous real and perceived reasons for the controversy and delay, however. During Task Force discussion, problems frequently mentioned involved legal barriers. The complexities of dealing with overlapping political jurisdictions and diverse governing authorities have hampered many cooperative efforts. Cooperation has often been carried out informally, sometimes despite the rules and regulations of individual institutions. As long as the volume of activity did not absorb a significant amount of staff time or library resources, this arrangement was adequate. As the demands have increased, however, libraries have been forced to formalize cooperative arrangements and in many cases, have entered into specific contracts with other institutions. While precedent for contracts between diverse public and private organizations existed, arrangements involving libraries sometimes have proven bulky, complicated and restrictive because the participants must be specifically defined. Also, contracts of this type are subject to change and reinterpretation at the state level.

There is a need for state legislation recognizing cooperative activities and organizations created at local, area and state levels.

Review of Statewide Plan

Setting up a formal statewide structure for coordination of cooperative and networking activities is a new endeavor in Wisconsin. This plan should be flexible and allow for changes. It should insure wide representation and responsiveness to its users' needs. The plan recommended by the Task Force will need careful study by librarians throughout the state. The final operating structure may undergo modification before it successfully meets the needs of all participants. Provision should be made for continuous review of statewide interlibrary cooperation and resource sharing programs.

Analysis and review of statewide networking structures should be undertaken five years after actual implementation of a statewide plan, and provision should be made for continuous formulation and monitoring of short-term and long-term goals.

CHAPTER 6

ALTERNATIVE STRUCTURES FOR A STATEWIDE PLAN

In the process of developing a recommended structure for cooperative library programs, Task Force members discussed and analyzed numerous issues and alternatives. This chapter is an attempt to focus on some of these issues and, when appropriate, present alternatives which received consideration. The Task Force attempted to reconcile most of these issues in the recommendations outlined in Chapter 7. In a few instances, however, further details may need to be supplied when legislation is drafted. Hopefully, this chapter will serve as background information should further deliberations prove necessary.

ORGANIZATION AT THE STATE LEVEL

The identification by Task Force members of barriers to interlibrary cooperation in three major areas--legislation, funding and planning--clearly pointed to the need for a single coordinating body at the state level to promote, plan and implement networking policies and programs for all types of libraries. To provide the strength and authority for successfully coping with these complex issues, the state-level coordinating body needs the following important attributes:

1. Representation and communication are needed from a wide range of sources to insure credibility and success in promoting and funding networking programs.
2. Statutory responsibility is needed for dealing with cooperative programs involving all kinds of libraries.
3. Statutory authority is needed for budget preparation, funding and auditing of expenditures.

Existing Organizations

Emphasis throughout the Task Force discussion has been on the utilization or modification of existing structures rather than the creation of entirely new structures. Several existing organizations and agencies could serve as the focus of state-level planning and, therefore, deserve analysis.

The Council on Library Development (COLD) was created by statute to "advise the State Superintendent with regard to the general policies and activities of the state's programs for library development and interlibrary cooperation." Its members are appointed by the governor and include as permanent members the President of the University of Wisconsin, the Director of the Board of Vocational, Technical and Adult Education and the Director of the Historical Society or their representatives. During the past few years, two of the above positions have been represented by librarians. Seven other members appointed for staggered three-year terms include three professional librarians and four laymen, one of whom must be a public library board member.

The present Council on Library Development has wide representation and is recognized in Chapter 15.377 of the state law. It has, however, been somewhat frustrated in making its recommendations heard and implemented. The Council has authorization only to report to the State Superintendent of Public Instruction. It has no staff of its own and no budget or authority to contract to implement programs. The mixture of citizens and librarians has meant members have had difficulty moving forward at the same pace.

The Division for Library Services (DLS) within the Department of Public Instruction (DPI) has been given a number of responsibilities in library development and interlibrary cooperation. The Division has the core responsibility for promoting the organization and improvement and coordinating the activities of both public and school libraries on a statewide basis. On a wider scale, it is also charged with encouraging "the coordination of public and school library services with other library programs of education agencies" and facilitating "interlibrary loans and other forms of interlibrary cooperation among all libraries in this state, including, without limitation because of enumeration, public, school, academic and special libraries, public library systems, regional resource centers and state-level library and information centers."

In the decade since these provisions were put into the library law, DLS has expanded its publication and statistical functions to incorporate all types of libraries. It has conducted special studies on aspects of interlibrary cooperation and has secured state funding for resource library contracts. Through the Library Services and Construction Act, Title III, it has promoted and funded a variety of cooperative projects. Through its administration of the public library systems law, it has stimulated intertype cooperation.

Despite the Division's statutory responsibilities for intertype cooperation, state funds have not been provided for a consultant position in this area. DLS staff have been participants in a wide range of cooperative activities based on the Wisconsin Library Association or the Council of Wisconsin Librarians. But, DLS has no formal broad source of input from all types of libraries; and academic and special librarians, in particular, do not find the Division an adequate leader in cooperative planning.

The Council of Wisconsin Librarians (COWL), incorporated as a nonprofit educational agency, has taken leadership in planning and overseeing some important library networking activities. The COWL Board is composed mostly of representatives of public and some private academic libraries, but includes representatives from DLS and the State Historical Society of Wisconsin. It is presently responsible for planning and overseeing the Wisconsin Interlibrary Loan Service (WILS) and a Wisconsin Library Consortium for participation in the Ohio College Library Center (OCLC). COWL has, however, some weaknesses for a group serving as a permanent focus for interlibrary cooperation. It is not recognized by statute, which could raise questions concerning some fiscal arrangements. Its membership is also not currently sufficiently broad to represent all types of libraries adequately.

Therefore, none of the above now meet all the necessary criteria, but with modifications their strengths could be utilized in designing a state-level coordinating structure.

Composition of Membership

The Task Force raised many questions concerning the membership composition of the proposed state-level structure. Its members identified a number of groups, both professional and nonprofessional, which should be represented:

1. Nonlibrarians involved in library development at an administrative level, responsible for budgeting and funding for library services.
2. Nonlibrarian citizens with a special interest in library services but no job-related involvement.
3. Professional librarians representing major state information resources, services or agencies.
4. Professional librarians representing various types of libraries.
5. Professional librarians representing various geographic areas of the state.

Several alternatives for organization were suggested involving varying numbers of bodies of different sizes and different composition.

Three-Part Organization

One alternative would involve the formation of three groups:

1. A modification of the Council on Library Development whose members would all be nonlibrarians, most of whom would represent those having funding authority for library services.
2. The formation of a group whose members would represent major state-level resources and would all be professional librarians. This group would plan and implement network operations and develop policies and budgets.
3. The formation of a large advisory council whose very broad membership would be elected from different areas to provide geographic and type of library representation for librarians. The general function of this group would be to provide a mechanism for sharing ideas and problems among areas, provide input on needs and priorities and feedback on plans, policies and network operations.

Generally, group three would provide input to group two which would work out planning details and operations and be responsible for implementing them. Group one would review and approve plans, policies and budgets. Under some conditions groups one, two and three might find it desirable to meet as a joint council.

Two-Part Organization

A second alternative would involve the formation of two groups:

1. A modification of COLD whose members would be either all nonlibrarians or a combination of librarian and nonlibrarian members. The Council would be attached to the DLS for administrative purposes. It would, however, have a broader function than the present Council. It would hire its own staff, apply for funds for interlibrary cooperation and networking in the state budget process and contract for state-level services or projects.

2. The formation of an advisory committee of moderate size but still representative of state-level resources and both area and type of library differences. This group would have a chairman who served as a liaison with the Council and staff. The function of this group would be to provide professional and technical assistance to the Council by investigating networking programs and preparing background materials and recommendations. It would also assist in planning and policy making and help coordinate activities at the area level.

Other suggested alternatives were basically permutations of the above two. These demonstrated several basic issues concerning the state-level structure which needed further discussion.

Size and Composition

The first issue was the number of groups required to fully represent all necessary elements. Some Task Force members said that the structure should be kept as simple as possible and saw the two-part structure as preferable. Several others said the three-part structure offered more input mechanisms and provided a greater voice for the librarians representing state-level resources who would have the eventual responsibility of implementing state-level services.

The size of the groups also caused some concern. It was generally agreed that group one in both alternatives should be small in order to function well. Most differences centered on the size of the advisory group. A large membership would provide the greatest range of input but would require a sizable travel reimbursement budget, might be difficult to convene often, and might also need a separate steering committee. A small group could probably function with a chairman utilizing the staff of the Council as liaison and might be able to meet more frequently.

Scope of Involvement in Library Development

Task Force members disagreed about the scope of involvement of the modified Council. Three concepts summarize the basic ideas presented:

1. The Council would function as a "State Library Board" with broad powers over all kinds of library development. This

might be equivalent to the Commission of Higher Education as it has been formed in some states. This would require quite drastic organizational and political changes.

2. The Council would have authority over networking and interlibrary cooperation programs only. This view would limit involvement greatly. Some members said it would be difficult to get nonlibrarians to serve actively on such a group.

3. The Council would have broad authority over networking and cooperative activities but would also be encouraged to examine the larger framework of state library development and make recommendations for improved services for all types of libraries. Interlibrary cooperation does not operate in a vacuum, and its success depends on the strength of individual libraries. Yet the Council would not set policy or have direct authority over any individual institution or type of library.

ORGANIZATION AT THE AREA LEVEL

Task Force members agreed that division of the state into areas and the organization of libraries of all types at the area level would be highly desirable. However, many questions surrounded the best method of accomplishing this:

1. How should the state be divided into areas? What boundaries should be utilized?

2. Where should the authority for intertype activity lie? What form or organization would prove most effective for formulating cooperative programs?

3. How should intertype activity be funded at the area level?

4. What relationship would the area structure have to the state-level planning structure and to the use of state-level resources?

During small group discussion, Task Force members listed the strengths and weaknesses of three possible methods of organization and in the process produced several other possible arrangements. The basic concepts discussed are outlined below.

Alliance of intertype library activity with an existing area library network.

CESAs, public library systems and the Health Science Library Network have area boundaries and provide some level of area information services. Only public library systems receive state funds for program operations. CESAs receive state funds for administrative purposes but provide services by contract, while the Health Science Library Network operates largely from federal funds. Public library systems also have a statutory mandate to participate in intertype library cooperation.

Therefore, Task Force discussion focused on possible alliance with public library systems rather than other alternatives. This could be a very close alliance with intertype programs coming directly under system management or a looser arrangement with the systems' boards serving in an administrative capacity to release funds. Actual planning of programs and policies could be carried out by a multitype organization in conjunction with the state-level Council.

This approach has several strengths. It utilizes an existing structure which already has legislative authority to foster interlibrary cooperation and presents a unified focus in consolidation of library planning and requests for funding. A number of participants were, however, uneasy about placing cooperative activities under a public library system umbrella in any manner. Public library systems do not yet cover the entire state; therefore, some areas might be unable to participate or receive funding. In areas with both public library systems and established intertype councils, some boundary conflicts may arise. Some Task Force members suggested that the tight arrangement would provide too much control for public library systems, while others said the looser arrangement would be too complex.

Development of multitype systems

Public library systems could convert to area library systems involving all types of libraries. Area system boards would have nonlibrarian members representing all types of libraries. These boards would be responsible for both single-type public library cooperation and multitype programs. Other single-type library cooperative activities such as school and health science library programs would continue to be funded through their own budgets. An advisory committee of librarians from all types of libraries could provide input to the board.

This alternative would have the advantage of presenting a strong unified effort for the development of library services to Wisconsin's citizens and would provide a single focus for funding. However, Task Force members representing several types of libraries said that this could threaten what is now public library system funding as a result of too much attention to other types of libraries; or, on the other hand, other types of libraries could be under-represented and cooperative projects not funded. Proponents of the concept expressed the opinion that if the system were truly an area multitype library system with its greatest focus on library services to users, some of the current subtle distinctions and forms of competition might not be so important.

Development of independent intertype councils throughout the state

This alternative could be patterned after the four existing intertype councils. The councils would exist independently of other area organizations, and their boundaries might not coincide with any of them. A number of options might be available for funding intertype councils directly, giving them total responsibility for administration of funds. The current statutes defining state aid to public library systems might be modified in several ways. A subsection could be added to the statutory formula, allowing additional funding for intertype activities. Intertype councils could then contract directly for services. This would not necessarily help areas without public library systems. Another possibility would be to use the system funding formula as a base for determining funding levels in all areas, but not necessarily tie distribution of funds to contracts with public library systems. Funds could instead be channeled to any existing publicly supported institution or system which could then contract with the intertype council.

Another alternative would be to have the independent councils present budget requests directly to the state Council which would develop a funding formula when applying for funds in the state budget process. Gaining independent status through legislation, however, might be politically complex and difficult to achieve. In any of the above, the present status of councils as nonprofit corporations without specific legislative recognition or standards for organization might make it difficult for them to obtain funds directly from the state and to contract for services with any institution or system. The reasons for this are discussed further in the next paragraph.

Funding Problems for Specialized and Cooperative Service Programs

Funding specialized and cooperative services has presented numerous procedural problems. Services can be obtained in various ways by public institutions once the need for the service has been justified and a precise description of it has been formulated. The institution can attempt to hire staff and purchase support materials in order to incorporate the program into its own ongoing operations, or it can contract with an outside agency to provide it. Contracts with profit-making institutions usually require a competitive bidding process. In many instances, the needed services are not available from profit-making institutions, and the public institution does not want to absorb them internally. To meet needs of this kind, independent groups incorporated as nonprofit educational agencies are formed to provide the service. Incorporation as a nonprofit educational agency provides the group with a legal identity and protection against having to pay taxes on the money received via contracts to provide services. Even with this legally incorporated status, however, nonprofit educational agencies are not always recognized by the state or federal government as being the unique providers of the services they offer. Recently the award of contracts by public institutions to nonprofit organizations has been challenged, and it has been suggested that contracts of this type cannot be awarded in the absence of a formal bidding process. Obtaining a waiver for this process has become more difficult and could hamper a consistent flow of funds to these groups.

Therefore, the provision of stable services for specialized and cooperative projects may be possible only through institutions or organizations specifically set up or organized under statutory authority. Organization as a nonprofit educational agency does not provide a guarantee that contracts can be awarded on a permanent basis.

Flexibility of Area Organization

These alternatives describe possible methods or organizing and funding area intertype activities. It is important to preserve for each area flexibility in determining the procedures for insuring adequate multitype representation and the exact programs and projects to be undertaken in each area.

Representation could be achieved through organizations such as the present intertype councils whose membership is voluntary and can include all libraries in the area and whose activities are governed by a board. In some areas the same function might be accomplished by a less formal organization elected to represent all types and kinds of libraries but not necessarily incorporating entire membership. Legal incorporation might not be necessary. Guidelines for area organization might eventually have to be developed in conjunction with the state-level coordinating council.

Each area should have the responsibility for assessing its own needs, setting its own priorities and planning the activities needed to meet these. Because many activities could be conducted in the absence of state funding, local coordination is extremely important.

CHAPTER 7

TASK FORCE RECOMMENDATIONS

STATEWIDE STRUCTURE FOR INTERLIBRARY COOPERATIVE ACTIVITIES

Throughout the many meetings of the Task Force and its Steering Committee, the participants explored all of the issues and the criteria outlined in earlier sections. In putting together a recommended plan, however, a number of practical considerations also received emphasis. Task Force members were concerned that a recommended plan incorporate a funding mechanism which could operate successfully within the current political framework. This would be facilitated by building on an existing administrative structure. On the other hand, participants wished to preserve independent control of the planning function for multitype library activities. There was a fear that attaching cooperative functions too closely to any existing library or educational agency would result in control of cooperative projects by that agency or type of library. Consolidating what appear to be conflicting concepts into one plan required careful consideration and a great deal of give and take on the part of Task Force members.

The chart on the next page illustrates the basic design of the recommended statewide structure. A more detailed description of its component parts follows. It was the hope of Task Force members that these recommendations would provide a basic starting point for continued planning. Modifications necessary to meet legal and political realities may take place during actual drafting of the legislation needed to implement this plan.

STATE-LEVEL STRUCTURE

STATE COUNCIL ON LIBRARY DEVELOPMENT AND NETWORKING

Purpose

The State Council on Library Development and Networking would serve as the major coordinating agency for cooperative planning of intertype library services for the state. It would be patterned after the present Council on Library Development but would have an expanded organizational framework and added authority in setting statewide priorities for and directing the course of development for interlibrary cooperation and resource sharing.

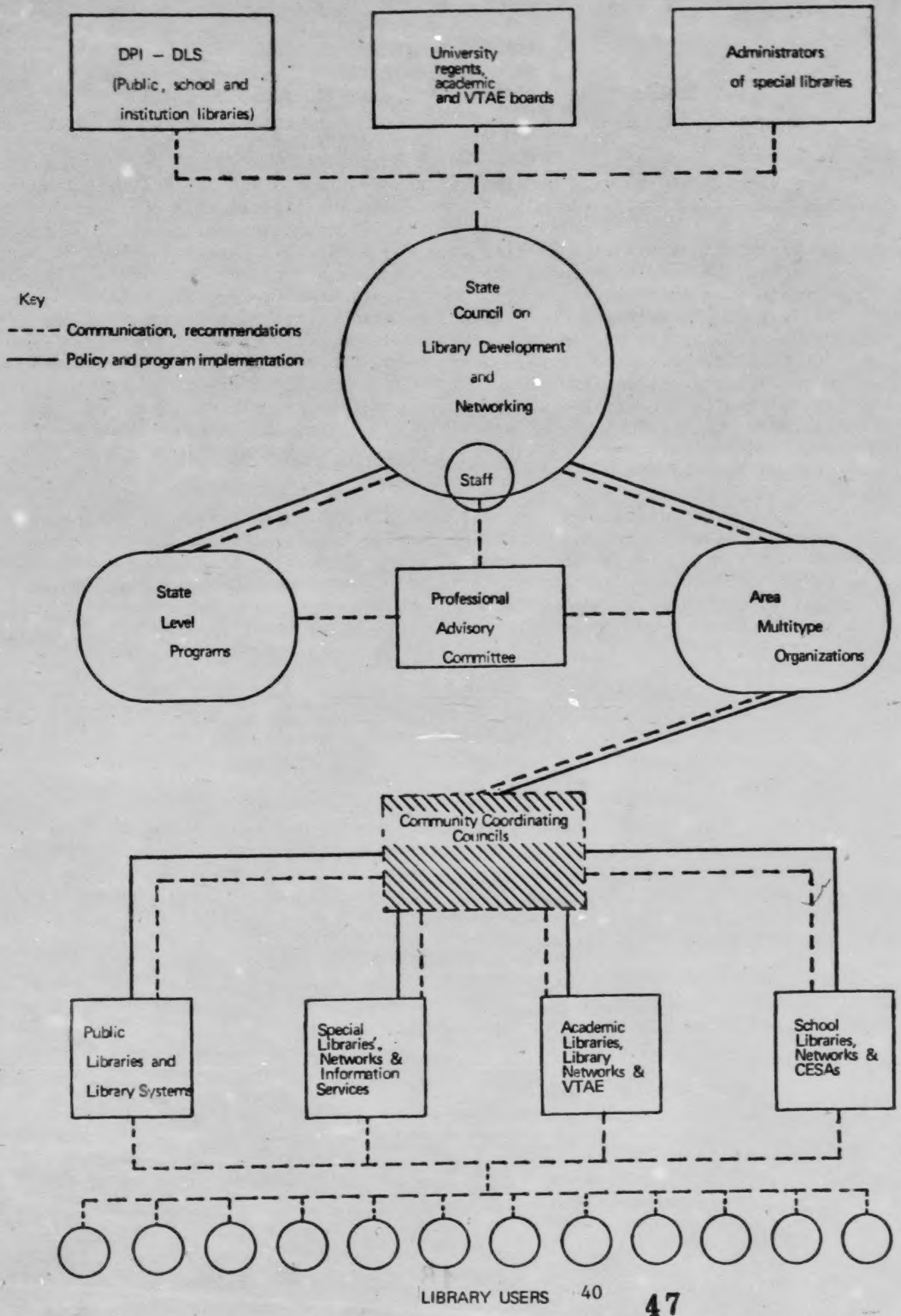
Functions

General: Encourage improved library services for all types of libraries.

Provide lobbying support for both basic and cooperative programs for and among all types of libraries.

Networking: Participate in developing state-level and long-range plan for networking activities and development of state-level resources.

STATEWIDE STRUCTURE FOR INTERLIBRARY COOPERATIVE ACTIVITIES


DPI – DLS (Public, school and institution libraries)
University regents, academic and VTAE boards
Administrators of special libraries
Key
- - - - Communication, recommendations
—— Policy and program implementation
State Council on Library Development and Networking
Staff
State Level Programs
Professional Advisory Committee
Area Multitype Organizations
Community Coordinating Councils
Public Libraries and Library Systems
Special Libraries, Networks & Information Services
Academic Libraries, Library Networks & VTAE
School Libraries, Networks & CESAs
LIBRARY USERS

Review, approve and evaluate policies and activities which implement the above plan.

Review, approve and evaluate area annual and long-range plans for multitype cooperative activities.

Arrange for contracts when appropriate and authorize expenditure of funds for state-level and area cooperative activities.

Promote use of federal and state funds and apply for grants for interlibrary cooperation and resource sharing programs.

Promote fiscal and legislative recognition of resource sharing programs and structures.

Organization

Budget: The State Council would prepare its own budget which would appear as a line-item in the budget of the Department of Public Instruction. It could hire its own staff, communicate its recommendations to other government agencies involved in library activities, contract with government agencies or profit or nonprofit corporations to have networking functions carried out and publish its own annual report. It would be attached to the Division for Library Services for administrative purposes only.

Membership: The membership of the State Council would be a combination of librarian and nonlibrarian members, all appointed by the Governor. The recommended size would be approximately 15 members of whom two would be citizens. As with the present Council, it might be desirable to have certain institutions permanently represented. The details of membership would have to be worked out as legislation were written. However, Task Force members suggested the following:

Nonlibrarians representing:
- President of the University of Wisconsin
- Director of the Historical Society
- Director of the Board of Vocational, Technical and Adult Education
- State Superintendent of Public Instruction
- Board of Regents, University of Wisconsin
- Public Library System Boards
- School District Administrators Association
- School Board Association
- Wisconsin Association of Independent Colleges and Universities

Citizens: Two other citizens interested in library use and development but not directly associated with or representing any individual institution or library.

Librarians: Appointed from the membership of the Professional Advisory Committee to represent this group and present its recommendations to the State Council.

PROFESSIONAL ADVISORY COMMITTEE

Purpose

Because the State Council membership would be small and include a majority of nonlibrarian members, a mechanism for utilizing wider librarian expertise seemed desirable. The Professional Advisory Committee would provide this kind of input and at the same time perform much of the groundwork necessary for decision making by the State Council. Planning for the future of networking will require the technical expertise of a wide range of librarians and may require the formation of investigative committees to study specific program ideas and issues.

Functions

Provide professional and technical assistance and coordination for the State Council in planning networking activities.

Assess needs and priorities for cooperative projects.

Provide recommendations for the State annual and long-range plans.

Form ad hoc committees for special project studies. (These could also be formed to represent or get input for interest groups.)

Provide a mechanism for communication from areas and sharing of ideas and problems among librarians from all types of libraries.

Provide preliminary review of area annual and long-range plans for multitype cooperative activities.

Make policy and implementation recommendations to the State Council

Organization

Membership: The membership of the Professional Advisory Committee would be chosen to insure representation from all geographic areas of the state, different types of libraries and other special interest groups. The group would range in size from 19-30 members. Suggestions for representation follow:

Areas:

Members would be elected from each area. If the number of areas is large, rotating membership might be desirable.

Types of libraries:

Members would be selected by the State Council from nominations made by such groups as the three Wisconsin Library Association Divisions (Wisconsin Association of Academic Librarians, Wisconsin Association of Public Librarians, Wisconsin Association of School Librarians) and the Wisconsin Chapters of the Special Library Association (SLA) and American Society for Information Science (ASIS). (See also "other members" below for further possible type of library representation.)

State-level resources:

Members would be selected by the State Council either directly or from nominations made by an ad hoc group of librarians representing libraries or library services providing statewide services.

Other members:

The State Council would select other members as necessary to balance representation of library types or special interests.

Size of Professional Advisory Committee:

Regions	8-15
Type of library	5
State-level resources	3- 5
Other members	3- 5
Total	19-30

STAFF OF THE STATE COUNCIL ON LIBRARY DEVELOPMENT AND NETWORKING

The staff of the State Council would consist of at least a professional librarian and secretary. They would act as a liaison between the State Council and the Professional Advisory Committee and would attend all meetings of both. They would also help with preparation of background materials and the drafting of recommendations.

DEPARTMENT OF PUBLIC INSTRUCTION AND DIVISION FOR LIBRARY SERVICES

The State Council on Library Development and Networking would be attached to the Division for Library Services for administrative purposes. The State Council budget would be applied for from the state through the Division. The State Council would, however, have control over program planning and expenditures. Fringe benefits for staff hired by the State Council also would be handled through the Division.

AREA-LEVEL STRUCTURE

Wisconsin's geographic areas vary widely in population density and concentration of number, size and types of libraries. Seven counties in the southeastern section of the state have approximatly 40% of the state's population. A wide variety of special, academic, school and public libraries are also found in this area. There is also a large concentration of specialized library collections in Dane County. All other areas of the state have libraries of varying types and sizes containing a wealth of information. Library users in towns, villages and cities of all sizes can benefit from a greater knowledge of and more flexible access to the information resources within the community. The first overtures at cooperation in a particular area should come at the local community level. When the needed resources cannot be found there, referral of the request or question should be passed to other libraries within the area and, if necessary, eventually to resources at the state level.

AREA MULTITYPE ORGANIZATIONS

Purpose

Cooperation among different types of libraries offers immense advantages to users at the area level. It provides access to more diverse information resources close to home through direct use or borrowing and interlibrary loan. Increased knowledge of area resources on the part of librarians would be reflected in improved and more sophisticated service to the user. Organization at the area level would provide the key to successful contact with the state and insure that state-level resources are responsive to area needs. Becuase the characteristics of geographic areas vary, each area must have the flexibility to examine its own needs and develop its own programs.

Functions

Foster cooperation and communication among librarians from all types of libraries.
Prepare annual and long-range plans for multitype library cooperation within the area and submit these plans to the State Council on Library Development and Networking.

Present recommendations for statewide programs and policies to the State Council.

When necessary, arrange for contracts to carry out cooperative programs.

Facilitate interlibrary loan and reference within the area by creating guidelines for referral of requests and questions. When needs cannot be met within the area, the area multitype organizations should work with the State Council in designating referral channels for use of state-level resources.

Identify and designate special purpose area library resources and work out arrangements for access by other libraries.

Plan area programs when development is needed to supplement state-level programs. Activities might include:

Development of union lists and directories
Building and sharing specialized materials collections
Development of area communications and delivery systems
Continuing education and consulting activities
Publicity and publication

Organization

Membership: Guidelines for membership should be drawn up by the State Council on Library Development and Networking to insure that the area organizations submitting plans and funding requests for area development are adequately representative of the libraries in the area. The area multitype organization could include total membership of libraries within the area or be made up of a smaller group representative of the various types of libraries. Task Force members indicated strong support for inclusion of nonlibrarian members in this multitype organization but stressed that flexibility in selection of all members should be left to the areas.

Administration: Administration would involve a number of activities and issues, and again, there could be several options. The handling of funds would require budget preparation, spending authorization, bookkeeping and auditing of expenditures. Arrangements would have to be made for personnel hired by area multitype organizations to receive fringe benefits and contracts for outside services may need to be authorized. The above functions could be handled (for the area multitype organization) by any existing publicly supported institution or system such as a public library system, public university, CESA or health science consortium. Planning for area multitype networking activities, however, would take place within the area multitype organization and would be reflected in a written plan presented to the State Council on Library Development and Networking. This plan would include details concerning areas to be served, service programs and the method of handling administrative functions. Following preliminary review of this plan by the Professional Advisory Committee and approval by the State Council, money would be released for cooperative library activities.

Each area multitype organization could hire a coordinator to facilitate planning and carrying out multitype activities. This coordinator could utilize office space in any library within the area willing and able to provide it.

Since cooperative library activities are most effective if they are based on a wide variety of resources, the boundaries of the areas served by area multitype organizations may need to be larger than the areas served by single-type library systems. To provide some consistency in development and prevent overlapping areas, the areas served by multitype organizations should be generally coterminous with one or more public library system where public library systems now exist. In areas where there are no public library systems, the area to be served would be specified in the plan filed with the State Council on Library Development and Networking.

Budget: Area-level interlibrary cooperative activities should be assisted with state funding. Funding for these activities should not be subtracted from state aid currently designated for area single-type library systems (such as state-aided public library systems). One approach to generating state funding for area cooperative activities would be to relate it to the present statutory formula for state funding of public library systems. For example, a law could be written to designate for multitype cooperative activity an additional amount of state money, equal to a certain percentage of that generated by the system funding formula. Upon submission and approval of an area plan for cooperative activity, as described above, state aid, in an amount based on the formula as applied to that area, would be allocated.

COMMUNITY COORDINATING COUNCILS

In order to expand knowledge of local resources and foster the personal associations so useful to cooperative projects, the Task Force recommends that informal community coordinating councils be formed at the local level. These would be voluntary organizations open to membership for all libraries and/or librarians within the community and would be organized only where appropriate or useful. They could range in sophistication from two or three librarians sharing ideas and problems to large and well-organized groups within a community or even a county area. Voluntary councils of this type would provide the basis for assessing user needs, setting priorities and providing input to the larger organization at an area level.

RESPONSIBILITIES FOR PROVISION OF LIBRARY SERVICES

Successful provision of library and information services depends on support for basic collections and personnel in all types of libraries. Cooperation and resource sharing can greatly enhance access to information if these basic services function effectively in a healthy supportive atmosphere. Provision of information services and coordination of cooperative programs must take place at several levels. The following outline of responsibility is designed to supplement the functions assigned the agencies described in the recommended statewide structure.

Local Library or Community Level

1. All libraries must provide basic services necessary to meet the needs of their primary user group. Each library should work toward meeting standards for collection size, staffing and building facilities set by state or federal governments and various library and information science associations.

2. Funding for library collections and services should be maintained at the present level or improved. No funds earmarked for cooperative activities would be used to replace funding for ongoing library activities.

3. Local librarians should be aware of the resources of their immediate community or area. Whenever feasible, needs should be met by utilizing local collections before services at the area or state level are tapped.

4. Local libraries should determine their own goals and objectives for taking part in cooperative arrangements. Libraries of all types should be prepared to take part in planning for activities on an area basis.

5. Local librarians have the responsibility of communicating the benefits of expanded resources and cooperative activities to library users, local politicians and local government officials.

Area Level

1. Identify strengths and weaknesses and assess information services and collection needs within the area.

2. Plan communication and access channels which capitalize on area strengths and extend service to wider areas. The area network should serve as a backup to local libraries in meeting user needs.

3. Facilitate interlibrary loan and reference by standardizing referral procedures and identifying the most appropriate and effective referral channels within the area. When needs cannot be met within the area, cooperative arrangements should be made with other area or state-level resources.

4. Plan and implement other projects and activities which meet area needs.

5. Recommend programs and policies to be carried out at the state level.

State Level

1. Encourage improved library services for all types of libraries.

2. Lobby in support of improved basic and cooperative programs for and among all types of libraries.

3. Investigate the most effective use of specialized collections and services and designate those which should serve as state-level resources.

4. Investigate alternative funding possibilities and aggressively seek to provide a firm financial base for all state-level resources and programs.

5. Set guidelines for area development of library services and coordinate activities among areas.

6. Interface with other state, multistate or national networks and guide Wisconsin's planning to insure programs are compatible with those emerging at these levels.

CHAPTER 8

SOME STATEWIDE PROGRAMS OR ACTIVITIES

Task Force members frequently discussed specific cooperative and networking activities which should receive priority. Deficiencies which surfaced during the discussion of barriers to interlibrary cooperation and resource sharing were the lack of bibliographic access to materials, the lack of standardized procedures for referral of interloan and reference requests and for keeping statistical records and the absence of efficient statewide communications and delivery systems. The activities work sheets filled out by Task Force members (Chapter 2) listed some activities which might overcome these barriers, listed other suggested possibilities and registered some indication of expressed need and support for them. The research project also pointed out areas of strength and weakness in cooperative activities.

The combination of ideas from these diverse Task Force activities emphasized several areas of high interest for statewide programs. Suggestions for programs to be given priority attention at all levels are discussed below. Task Force members expressed the necessity for continuous evaluation of library needs in these and other areas and periodic review of planning efforts and program implementation.

INTERLIBRARY LOAN

Interlibrary loan received emphasis as a priority at all levels--local, area and state. The need to acquire materials outside of one's own collection has been articulated by librarians for many years and development of interlibrary loan systems has surpassed the development of other cooperative activities in most states.

In Wisconsin interlibrary loan channels have emerged which greatly benefit the libraries taking part. This development has been uneven in that all types of libraries do not have equal access to these channels. Interloan arrangements are based in part on a complex and often confusing network of contracts and fee assessments from individual libraries or government agencies supporting single-type library interaction. A few umbrella-type contracts cover the activities of a large number of libraries regardless of quantity of use by individual institutions. Some libraries or services charge for interloan privileges in the form of either yearly assessments or transaction fees, while interloan activity is absorbed by other institutions with no direct compensation. Therefore, while interlibrary loan is available by some means for most libraries, there are still gaps and the fiscal arrangements are uneven and complex. The possible channels are often confusing and may well be under-utilized by librarians who do not realize that access of any kind is available to them.

Recommendations:

1. Investigation of easier and more equitable interloan channels based on the needs of different types of libraries should be carried out at both the state and area level.

2. Investigation of firm state funding (not based on individual contracts) for interlibrary loan should be carried out at the state level.

3. A uniform interlibrary loan code which would define interloan procedures and channels more clearly should be developed and published at the state level.

REFERENCE REQUEST REFERRAL

Although the two are sometimes closely related, reference request referral is a distinct and separate activity from interlibrary loan. An interlibrary loan transaction is usually defined as a request for a specific piece of material for which the author, title and other bibliographic data are known. A reference question requires supplying specific facts or general information on a subject in the absence of known bibliographic data. It also requires careful discussion to determine the library users' precise needs. Often a librarian can convert a reference request to an author/title request by consulting bibliographies, the card catalog or publishers' lists, but this is not always the most effective approach. When the request requires factual information, statistics or other details, it may be more appropriate to utilize specialized reference materials or the expertise of another librarian or specialist in the field. In this case it may be necessary to refer the request as a distinct question. Both interlibrary loan and reference referral are facilitated by standardized procedures and formats for referral. Reference referral can become hopelessly frustrating and useless if it is not approached with a certain amount of care and discipline. A casually referred request often lacks enough detail on both the library users' needs and reasons for wanting the material and the amount of work already put into the request by the originating librarian.

Recommendations:

1. The value of reference request referral should be explored further among libraries of all types.

2. Standardized procedures and format for reference request referral should be formulated and published at the state level.

3. Continuing emphasis should be placed on identifying specialized collections and staff expertise and channels for reference referral should be designated.

4. Communication and advanced information retrieval technologies, such as those discussed in the next section of this chapter, should be used to enhance referral and answering of reference requests.

USE OF NEW TECHNOLOGIES

The application of new technology is rapidly changing many library operations. The potential for increased efficiency and better service to information consumer is outstanding. Computer applications are currently influencing traditional library operations such as cataloging, circulation, acquisition, information retrieval and the teaching of library use skills. Bibliographic control and access to materials undoubtedly will be greatly improved on a national scale. Micrographics, telecommunications and increased use of audiovisual media offer opportunities for improving library operations.

Enormous coordination and planning efforts are necessary to take advantage of this potential. The costs of initiating new technological programs may be high and some experimentation may be necessary. It is important that development be coordinated, however, so that the entire state can benefit from the investment in these programs. Care must also be taken that statewide programs are compatible with those being undertaken at multistate and national levels. The emerging regional network, MIDLNET, may offer effective access to new programs. The National Commission on Libraries and Information Services has published a national plan, Toward a National Program for Library and Information Services: Goals for Action. Much of the Task Force discussion in this report was undertaken in light of these reports and projects. Continued monitoring of progress in networking and development of new technology at the national and regional levels is both necessary and desirable. Task Force members identified several priority areas for further investigation in applying technological advances in Wisconsin. These are discussed below.

Development of Union Lists

Lack of bibliographic access was identified early by the Task Force as a major obstacle to effective interlibrary cooperation. Union lists of varying types have helped alleviate this problem in some areas of the state, but development of these finding tools has also been uneven. There are no state-level union lists of books, serials or audiovisual materials. Many libraries have attempted to put together a collection of single library lists and area lists, thereby achieving some knowledge of resource availability.

Lack of bibliographic access influences acquisitions and interloan patterns. Libraries buy material independently, each concentrating on the most urgent needs and often ignoring lesser used items. Cooperation in purchase of little-used items would insure availability of a wider range of materials within the state. When borrowing materials, libraries tend to contact the institution which seems most likely to have the materials, usually the largest library. This results in a few libraries becoming the largest lenders, even though many of the materials requested may be available elsewhere. Experience in other states shows a breaking point is eventually reached. The collection becomes overused, materials are not available, staff cannot handle the volume of requests and fill rate decreases while turnaround time increases. In other words, service declines. Area resources often are not utilized even though some requests could be filled through them. Yet efficient use of area libraries is greatly hampered by the lack of union lists, as the "guess" method of interloan can result in an inordinate number of transactions per request. The case studies indicated use of available union lists to tap varying area resources (Library J) was just as effective as utilizing maximum access to a single large collection (Libraries G and I).

A good deal of interloan traffic among academic, special and school libraries involves serial use. Public libraries show a greater need for books. Development of serial lists is technically more feasible and less costly than development of book lists simply because the total aggregate of titles is smaller. Computerized bibliographic access to books is changing rapidly and deserves further investigation.

Recommendations:

1. The development of a state union list of serials which includes the largest and most specialized serial collections within the state should be undertaken. Following analysis of the number and size of libraries included in the state list, development of area lists should be encouraged to fill gaps in collection knowledge and encourage maximum use of area resources.

2. The use of existing computer technology to improve bibliographic control and access to materials should be analyzed and applications in Wisconsin pursued. Further investigation of contracts with such services and organizations as Ohio's OCLC, California's BALLOTS or MIDLNET should be undertaken.

Communications Systems

Effective resource sharing requires fast, efficient communication between libraries. The chief focus of networking is to provide rapid and convenient access to information for the user. The research showed that most libraries rely on traditional communication channels such as mail, parcel services, dedicated delivery systems or telephone. Still, some libraries do not even have convenient access to such a fundamental communication device as the telephone. The use of teletype or computer communication systems is even more sparse. Coordination at local, area and state levels is needed to ensure adequate communication channels among libraries.

Recommendations:

1. All local libraries should budget for and utilize minimal level communications systems such as the mail or local telephone.

2. State level investigation of funding more widespread use of teletype and long-distance telephone for interlibrary communication should be undertaken.

3. Further attention and study should be given to emerging technological advances in communication which involve use of computers, satellites, Community Antenna Television (CATV) and other forms of telecommunication.

Computerized Information Retrieval

The use of computerized information retrieval is receiving much current attention and is closely related to reference service. Skilled data base searching requires a clear understanding of user needs and a great deal of knowledge in the subject area being searched and use of the data base as a reference tool. A recent publication by the Council of Wisconsin Librarians, A Survey of *Machine-Readable Bibliographic and Numerical Data Bases and Related Services in Wisconsin* lists 58 computerized data bases in use. Twelve of these are related to in-house library operations for individual institutions and might have limited use for reference purposes. Data base brokers such as Lockheed and Systems Development Corporation offer access to approximately 40 data bases useful for information retrieval. Most, if not all, of these are available in Wisconsin through one or more libraries. Yet the Task Force survey results suggested that many librarians are not aware of either the potential offered by these services or the means of possible access to them.

Recommendations:

1. Further investigation should be given to coordinating the use of computerized data base searching in order to effectively realize the potential of this efficient but somewhat costly reference tool.

CHAPTER 9

IMPLEMENTATION OF TASK FORCE RECOMMENDATIONS

Implementation of the Task Force recommendations will require legislative change in at least two major areas. The modified composition and expanded authority of the Council on Library Development must be recognized and its relationship to the newly created Professional Advisory Committee outlined.

Provision for funding intertype cooperative activities at both the state and area levels must be included in new legislation. This may require more specific recognition of the State Council as an agency with the authority to apply for funds in the state budget process.

Implementation of some recommendations will have to await the actual passage of legislation, but in other instances, action can be taken in the interim. Actual state funding for cooperative activities as outlined in the recommendations cannot be implemented without the necessary changes in legislation.

Therefore, the first steps in implementation involve getting widespread reaction to and support for the recommendations and bringing together a small representative group to draft model legislation. This group should be appointed by the Council on Library Development and work with the Wisconsin Library Association's Library Development and Legislation Committee and the Legislative Reference Bureau.

The Council on Library Development should pursue implementation of the Task Force recommendations by appointing an ad hoc professional advisory committee to study the need for specific statewide projects and determine which can most successfully be carried out in the absence of the proposed legislation.

The process of securing legislation is lengthy. Planning and participation in cooperative projects in Wisconsin should not diminish in the meantime. As the Task Force indicated in its early discussions, there is a need to educate more librarians, administrators, legislators and citizens about the benefits and possibilities inherent in interlibrary cooperative activities. All librarians should encourage their administrators to include funds for some cooperative projects in their own library budgets. State funds, which should be sought, could be efficiently used to provide backup services, organize and staff specialized collections not already available and fund comprehensive and costly projects with statewide implications and benefits. None of the above services will be truly effective if local libraries do not develop their own services and staff in a manner which allows effective participation.

At the area level cooperative activities should also be continued or developed. In areas where there are not already existing intertype activities, ad hoc multitype organizations representative of all types of libraries could be formed to assess local or area strengths and needs, define possible roles of the various institutions in the area and set priorities. It takes time to lay the groundwork for successful intertype cooperative activities. A great deal can be accomplished by improving communication and developing personal contacts. Planning of this type could greatly improve the effectiveness of eventual state-funded programs at the area level.

SUMMARY

Steps toward implementation:

1. Submit the final report of the Task Force to the present Council on Library Development.

2. Distribute the final report as widely as possible and encourage discussion of the recommendations.

3. Form one or more ad hoc committees to advise the Council on Library Development on the following:

    a. drafting model legislation.

    b. beginning work on cooperative projects which can be started or carried out in the interim.

4. Form ad hoc multitype organizations at the area level to lay the groundwork for beginning or further intertype cooperative programs.

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COOPERATIVE LIBRARY SERVICES AND STATE-LEVEL RESOURCES IN WISCONSIN

More detailed information is published annual by the Division for Library Services in the Library Service Record.

Area Research Centers (ARC)

A cooperative network with 14 members organized under the State Historical Society of Wisconsin at Madison. Each holds original papers of individuals, organizations and businesses in its region. Encourages wider use of documents through transfers within the network.

Bureau of Audio-Visual Instruction (BAVI)

Part of the University of Wisconsin-Extension. Maintains a large film library which is available to Wisconsin film users--schools, organizations, and individuals.

Cooperative Children's Book Center (CCBC)

A noncirculating children's book center on the UW-Madison campus where individuals and groups may examine, read and evaluate children's and young people's books. A joint project of the UW-Madison and the DLS.

Cooperative Educational Service Agencies (CESA)

Nineteen regional agencies established by the 1963 legislature to serve Wisconsin's public school districts. Each CESA provides its local districts with a means for improving programs and effecting savings through regional cooperation on a voluntary basis.

Coordinated Library Information Program (CLIP)

Started by DLS in 1970 as a Library Services and Construction Act Title III project. Evolved from the recognition of the importance of public communication for all types of libraries. Publishes the newsletter Tips from Clip.

Council on Library Development (COLD)

A statutory council appointed by the Governor which advises the State Superintendent with regard to the general policies and activities of the state's programs for library development and interlibrary coordination.

Council of Wisconsin Librarians (COWL)

An organization of academic librarians seeking to coordinate library activities, especially cooperative activities. Under the auspices of COWL, WILS was established in 1972, and the Wisconsin Library Consortium in 1975. Activities have recently been expanded to include other than academic libraries.

Division for Library Services (DLS)

A division of DPI responsible for supervision and improvement of school and public libraries and public library systems, and for coordination of all types of libraries. It administers Elementary and Secondary Education Act, Title II and Library Services and Construction Act funds.

Department of Public Instruction (DPI)

Wisconsin state agency of which DLS is a part.

Educational Communications Board (ECB)

Holds the responsibility for developing, maintaining and operating Wisconsin's educational radio and television network which was established in 1972 and serves a large portion of the education community.

Educational Telephone Network (ETN)

A UW-Extension-based network of telephone lines which allows participants in educational programs including library programs to hear each other and be heard in any of the network outlets in more than 100 Wisconsin communities.

Dial Access Intercity Network (DAIN)

A state telephone network comprised of dedicated telephone lines which provide official long distance calling to any dialable telephone in the contiguous United States. Makes intercity service more accessible and reduces the overall cost of intercity telephone use.

Friends of Wisconsin Libraries (FOWL)

A statewide organization of citizens interested in their libraries and devoted to the welfare of their communities who have joined together to actively aid libraries throughout the state.

Information Pass (INFOPASS)

First implemented in Illinois, program permits libraries to refer their patrons to other participating libraries when unable to fill a request with resources on their own premises. Now being implemented by LCOMM and TLC.

Legislative Reference Bureau

A state level resource which serves the legislature, state departments, students of government and citizens. Provides information on all aspects of special studies and maintains a collection of public documents of Wisconsin, other states and the federal government.

Library Council of Metropolitan Milwaukee (LCOMM)

A library organization including all types of libraries in Milwaukee, Ozaukee, Washington and Waukesha counties.

Madison Area Library Council (MALC)

A library organization including all types of libraries in Dane County.

Milwaukee Public Library

The state's largest public library with a collection of nearly 2.4 million volumes and an operating budget of over $7.4 million in 1975. Serves as the Milwaukee County Federated Library system headquarters and resource library and as a statewide resource through contract with the Division for Library Services.

Northeast Wisconsin Intertype Libraries (NEWIL)

A library organization including all types of libraries in the Fox Valley area.

Northeastern Wisconsin In-School Television (NEWIST)

A regional broadcast council organized to promote use of instructional radio and television. It offers teacher inservice workshops to help teachers select, use and incorporate programs into existing curriculums.

Northwoods Intertype Cooperating Libraries - Media Centers (NICL-M)

Informal intertype organization in Oneida County and bordering areas. Activities emphasize continuing education and some resource sharing.

Public Library Systems

Public library systems are the result of legislation enacted in December of 1971 designed to encourage groups of public libraries to organize and cooperate in order to fulfill the library needs of persons residing in the defined system area. Systems vary in size from single county to ten county organizations. State aid to public systems totaled $2,912,760 in 1975. Services also vary, but many systems provide reciprocal borrowing, interlibrary loan and reference, communication and delivery systems, coordinated acquisitions, centralized cataloging and processing, continuing education, coordinated service to special groups, bookmobiles, books by mail and consulting services.

Systems operating in 1976 were:

- La Crosse Area Library System
- Manitowoc County Library System
- Mid-Wisconsin Federated Library System
- Milwaukee County Federated Library System
- Nicolet Area Library System
- Northwest Wisconsin Library System
- Outagamie-Waupaca Counties Federated Library System
- Rock County Library System
- South Central Library System
- Southwest Wisconsin Library System
- Wisconsin Valley Library Service

Reference and Loan Library (RLL)

A state resource operated by the Bureau for Reference and Loan Services of the DLS. Serves as a backup resource for public libraries, library systems and schools. Provides direct services to state agencies, institutions and individuals without legal access to public library services.

Special Education Instructional Materials Centers (SEIMC)

Centers operated by the CESAs which provide a variety of print and non-print materials useful in working with students who are handicapped or retarded. Centers now operating in Wisconsin are at Gillett, Cumberland, Elmwood, Chippewa Falls, Stevens Point, Oshkosh, Onalaska, Portage, Fennimore, Janesville, Ashland, Minocqua and Racine. A specialized center for all visually impaired children throughout the state is located at the Wisconsin School for the Visually Handicapped at Janesville.

State Historical Society of Wisconsin

One of eight major divisions of the Society, the Library Division's historic function has been to develop and service an outstanding collection of research materials in American history.

State Law Library

Established by the Congressional Act of 1836 which created the Wisconsin territory. It is a public library, but its main service is as the legal resource center for the Wisconsin Supreme Court, the Department of Justice, the Legislature, members of the Executive Department and the various executive agencies and members of the Bar of Wisconsin.

Tri-County Library Council (TLC)

A library organization including all types of libraries in Racine, Walworth and Kenosha counties.

Private Line Tetetypewriter (TWP)

Stations with TWP communicate only with other stations in the private network. In Wisconsin TWP connects the Reference and Loan Library and six libraries in the Fox Valley.

Teletypewriter Exchange Service (TWX)

A communication device which allows printed messages to be transmitted along telephone lines. Any station with TWX can communicate with any other station with TWX. Used by libraries for interlibrary loan purposes.

University of Wisconsin-Madison Libraries

The University of Wisconsin-Madison Memorial Library is the state's largest academic library with nearly three million volumes and an operating budget of over $7 million for 1974-75. There are over 60 libraries and information centers on the Madison campus.

Vocational, Technical, Adult Education Institutes (VTAE)

Wisconsin is divided into 16 VTAE districts. A state board establishes policy for the direction of the programs of the state and supervises curriculum standards and personnel qualifications.

Wisconsin Association of Independent Colleges and Universities (WAICU)

A formal organization including all private institutions for higher education in Wisconsin. Organized to promote private education and coordinate grant funds.

Wisconsin Audio Visual Association (WAVA)

Its purpose is the improvement of education in the state through the effective use of audiovisual materials and methods.

Wisconsin Information Retrieval for Education (WIRE)

A computerized retrieval program, operating from DPI, designed to search the data bases of the Educational Resources Information Center (ERIC).

Wisconsin Information Services

Under the auspices of the College of Engineering and the University-Industry Research Program, this service draws upon the University's scientific and technical libraries, information centers and academic expertise of the faculty to serve business and industry throughout the United States. Fees vary according to the complexity of the request.

Wisconsin Instant Information System for Students and Counselors (WISC)

A program designed to provide occupational information used by secondary school students and counselors. Program funded at DPI by Elementary and Secondary Education Act Title III and the Vocational Education Act.

Wisconsin Interlibrary Loan Service (WILS)

Established by COWL in 1972. Supported by a contract with DLS and fees from academic library members. A contract with the UW-Madison provides interloan access for members to Madison campus library collections. WILS has initiated an interface with Minnesota Inter-Library Teletype Exchange (MINITEX).

Wisconsin Health Science Library Network

A network of six health science library consortia which promotes cooperative programs such as interlibrary loan, reference service, development of union lists, coordinated serials acquisition and retention and other educational activities. The Wisconsin network is linked to six state Midwest Health Science Library Networks and the National Library of Medicine.

Wisconsin Library Association (WLA)

Its purpose is to promote the development and improvement of libraries, library services and librarianship in Wisconsin. It develops programs and actively supports measures designed to achieve these goals.

Wisconsin Library Bulletin

A professional journal published by DLS which includes articles and news of Wisconsin libraries and library associations.

Wisconsin Regional Library for the Blind and Physically Handicapped

Located in the Milwaukee Public Library and supported by a contract with DLS which provides funds for staff and operating costs. The Library of Congress provides talking books, cassettes, machines and Braille materials and the Milwaukee Public Library provides large-print materials. Serves 44,200 individuals who are unable to read ordinary print comfortably.

GEOGRAPHIC DISTRIBUTION OF INTERLIBRARY COOPERATION

Key

○ Cooperative Educational Service Agencies (CESAs)

▒ Public Library Systems, 1976

- La Crosse Area Library System
- Manitowoc County Federated Library System
- Mid-Wisconsin Federated Library System
- Milwaukee County Federated Library System
- Nicolet Area Library System
- Northwest Wisconsin Library System
- Outagamie/Waupaca Counties Federated Library System
- Rock County Library System
- South Central Library System
- Southwest Wisconsin Library System
- Wisconsin Valley Library Service

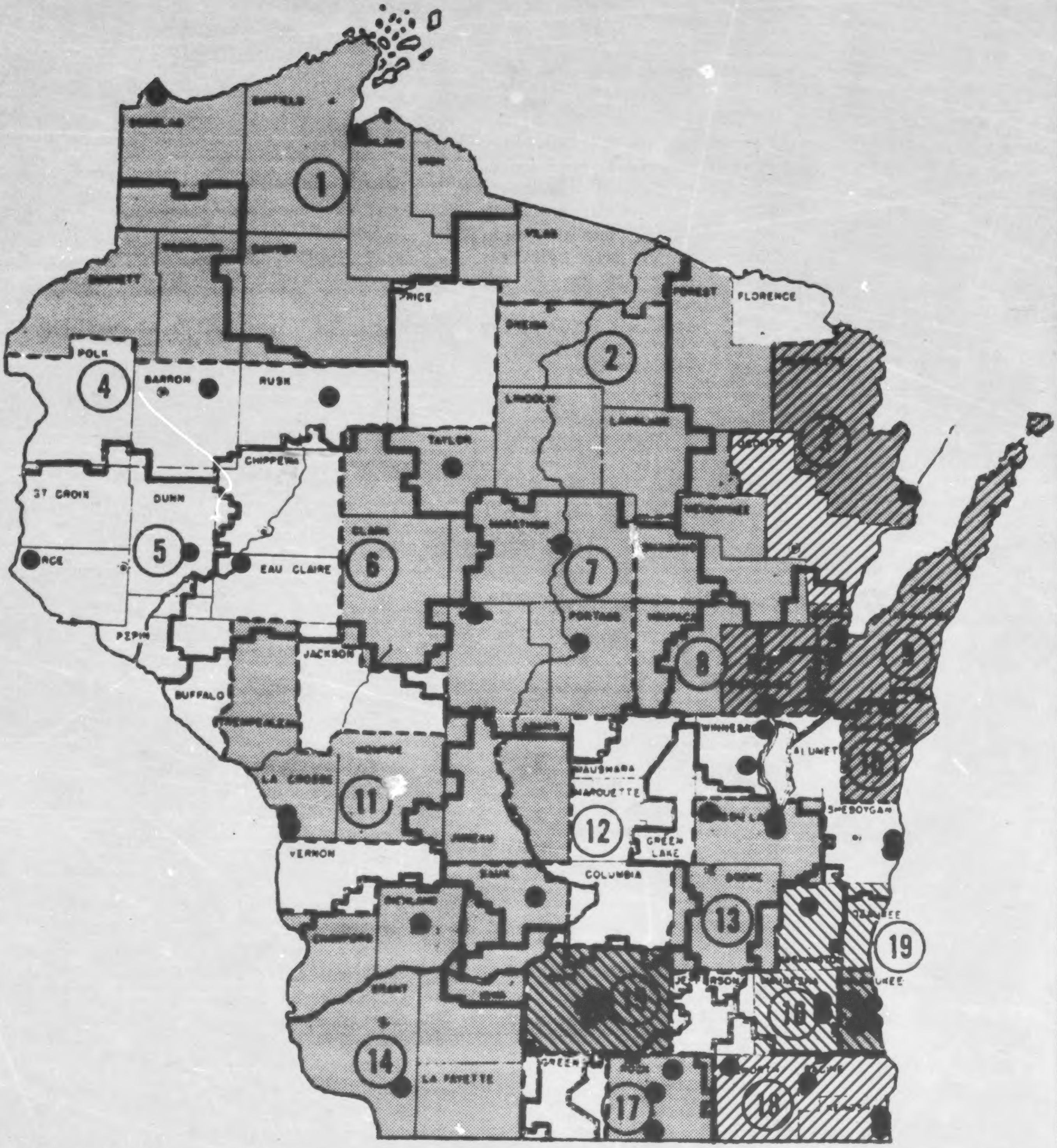
▨ Intertype Library Councils

- Library Council of Metropolitan Milwaukee
- Madison Area Library Council
- Northeast Wisconsin Intertype Libraries
- Tri-County Library Council

● WILS Participating Libraries

- Alverno College
- Beloit College
- Cardinal Stritch College
- Carroll College
- Carthage College
- Edgewood College
- Holy Redeemer College
- Lakeland College
- Lawrence University
- Marian College
- Marquette University
- Milton College
- Mount Mary College
- Mount Senario College
- Northland College
- Ripon College
- St. Norbert College
- UW - Eau Claire
- UW - Green Bay
- UW - La Crosse
- UW - Madison
- UW - Milwaukee
- UW - Oshkosh
- UW - Parkside
- UW - Platteville
- UW - River Falls
- UW - Stevens Point
- UW - Stout
- UW - Superior
- UW - Whitewater
- UW Center - Baraboo
- UW Center - Barron
- UW Center - Fond du Lac
- UW Center - Fox Valley
- UW Center - Manitowoc
- UW Center - Marathon
- UW Center - Marinette
- UW Center - Marshfield
- UW Center - Medford
- UW Center - Richland
- UW Center - Rock
- UW Center - Sheboygan
- UW Center - Washington
- UW Center - Waukesha
- Viterbo College
- Division for Library Services
- Medical College of Wisconsin
- Midwest Health Science Network

THE GEOGRAPHIC DISTRIBUTION OF INTERLIBRARY COOPERATION


1
VILAS
PRICE
FOREST
FLORENCE
ONEIDA
2
POLK
4
BARRON
RUSK
LINCOLN
TAYLOR
CHIPPEWA
ST CROIX
DUNN
5
RCE
EAU CLAIRE
CLARK
6
MARATHON
7
PORTAGE
PEPIN
8
JACKSON
BUFFALO
LA CROSSE
MONROE
11
WAUSHARA
MARQUETTE
12
GREEN LAKE
CALUMET
SHEBOYGAN
VERNON
JUNEAU
SAUK
COLUMBIA
DODGE
13
19
JEFFERSON
16
GRANT
14
LA FAYETTE
GREEN
17
18

SURVEY QUESTIONNAIRE

Purpose

The mail survey was designed to obtain broad information on present patterns of participation in cooperative activities by all types of libraries in Wisconsin. A special attempt was made to gather detailed information on volume, referral patterns and needs for interlibrary loan and reference between different types of libraries.

Procedures

The survey was planned and carried out by the Task Force Coordinator. The Wisconsin Survey Research Laboratory (University of Wisconsin-Extension) worked under contract to perform a number of important functions.

The survey questionnaire was drafted by the Task Force Coordinator, reviewed by Survey Research Laboratory personnel, pretested in several Madison libraries and further revised before printing and mailing. (The questionnaire is shown on pages 74-81.)

Mailing took place in early February, 1976. A cover letter was sent out under the signature of Lyle Eberhart. Ben Franckowiak, Bureau of School Library Media Programs, added his signature to those going to schools and Special Library Association President, Jack Baltes endorsed those sent to special libraries. Use of a mailing permit for the Department of Public Instruction negated the necessity for return postage. A second mailing was sent to nonrespondents at the beginning of March listing a March 15 deadline. Responses were accepted until the first week in April. (Sample letters are shown on pages 82-83.)

All questionnaires were turned over to the Wisconsin Survey Research Laboratory whose staff members performed the necessary coding, keypunching and computer analysis after consultation with the Task Force Coordinator.

Survey Population

Mailing lists for public, academic and special libraries were taken from the Wisconsin Library Service Record, 1974 with updates received for the 1975 edition which was in process. Surveys were sent to all public, academic and special libraries.

The large number of school libraries in Wisconsin made a complete mailing prohibitive. The Wisconsin Survey Research Laboratory developed a sampling plan for school libraries. The DPI Bureau of School Library Media Programs provided lists of schools, public and private, with centralized libraries staffed by certified librarians. Computer-produced mailing lists were used as the basis of the sample. Elementary school libraries were sampled separately from secondary school libraries so that separate analysis of the data would be feasible. A percentage sample was drawn from each group. In the data analysis it has been assumed that the school library respondents are representative of the nonresponding school libraries.

Survey Response

To determine how representative the libraries which responded were of the total which received questionnaires, analysis of usable responses was made by type of library and by geographical region. These tabulations are shown below.

Usable Responses by Type of Library

Type of library	Total number surveyed	Usable responses	Percent usable responses of total
Academic	75*	64	85%
Public	351*	283	81%
School	409**	273	67%
Elementary	200	118	59%
Secondary	209	155	74%
Special	360*	225	63%
Total	1195	845	71%

*All known libraries of this type included
**Random sample of known schools

Usable Responses by County

County	Number of questions Sent	Returned
Adams	2	1
Ashland	12	7
Barron	11	6
Bayfield	5	4
Brown	27	19
Buffalo	6	6
Burnett	4	1
Calumet	8	4
Chippewa	13	10
Clark	19	13
Columbia	12	12
Crawford	4	4
Dane	194	126
Dodge	22	16
Door	2	2
Douglas	7	6
Dunn	10	10
Eau Claire	15	11
Florence	0	0
Fond du Lac	19	13
Forest	3	3
Grant	20	15
Green	7	5
Green Lake	6	6

County	Number of questions	
	Sent	Returned
Iowa	8	6
Iron	3	2
Jackson	6	2
Jefferson	18	9
Juneau	8	5
Kenosha	30	21
Kewaunee	5	4
La Crosse	18	14
Lafayette	10	8
Langlade	3	1
Lincoln	3	1
Manitowoc	12	10
Marathon	11	8
Marinette	8	6
Marquette	4	1
Menominee	1	1
Milwaukee	186	116
Monroe	6	6
Oconto	8	7
Oneida	9	7
Outagamie	24	20
Ozaukee	11	8
Pepin	4	3
Pierce	9	8
Polk	14	9
Portage	15	8
Price	6	5
Racine	36	24
Richland	5	3
Rock	28	23
Rusk	3	3
St. Croix	15	11
Sauk	18	15
Sawyer	3	2
Shawano	2	2
Sheboygan	21	14
Taylor	8	6
Trempealeau	14	12
Vernon	10	7
Vilas	5	4
Walworth	23	19
Washburn	4	4
Washington	16	12
Waukesha	54	40
Waupaca	16	14
Waushara	8	6
Winnebago	22	11
Wood	16	13

A number of responses were received that could not be used. Five questionnaires arrived too late to be processed by the Survey Research Laboratory. Nine were returned with the notation that the library has been closed. Approximately 35 other respondents reported they had no library, had no librarian, or felt that the survey questionnaire had so little relationship to their operation that they did not wish to respond. The Wisconsin Library Service Record does list a number of special collections, information services and collections of public records which are not strictly libraries and are not administered by a librarian or even a single staff member. Some of these responses reflected this problem with our mailing list. A few, however, were returned from small public, school and special libraries and seemed to reflect a total lack of understanding and involvement in cooperative projects of any kind.

Figure 1

TASK FORCE ON INTERLIBRARY COOPERATION AND RESOURCE SHARING

Survey Questionnaire

All responses will be kept confidential

1. Name of Library ____________________

2. Location of Library ____________________
City County

3. Type of Library
____Special library (Government, medical, business, etc.)
____Special library connected or affiliated with a college or university
____College or university library
____Public library
____Elementary school library media center
____Junior or senior high school library media center

In answering questions 4, 5, 6a, and 6c, please use figures for the latest recorded fiscal year. If fiscal year is January 1 to December 31, use 1975 figures. If fiscal year is July 1 to June 30, use 1974-75 figures.

4. Please provide the following information concerning the size of your library's collection.
   a. Number of books (volumes): *Report the number of physical units of book stock and bound periodicals contained in one binding or portfolio. Book stock includes books and other materials such as government documents, pamphlets, paperback books, etc. which are cataloged in the same manner as books and which are or may be interfiled with books. Also include uncataloged government document collections and photographically reduced volumes in microfilm.* ______

   b. Number of periodical titles:
      Number currently received: *Exclude duplicates* ______
      Total number held: *Include ceased titles or those no longer subscribed to if figures are available.* ______

   c. Number of audiovisual materials: *Include films, filmstrips, records, tapes, slides, art prints, kits, maps, etc.* ______

5. Please report the total number of employees in full-time equivalents who work in your library: *Exclude maintenance staff, volunteer help or employees paid through programs not part of your library's operation. To compute "full-time equivalents" (FTE) of part-time employees, take the number of hours worked per week by a part-time employee and divide it by the number of hours in your full-time work week. For example, a part-time employee who works 25 hours per week in a library having 35 hour week is computed as follows: 25÷35=.71 or .7. Show to only one decimal place.* ______

6. Please provide the following information concerning your library's circulation.
   a. Direct circulation to library users: *Count one for each item loaned directly to a library user. Report the circulation of all print and audiovisual materials from the library.* ______

b. **Interlibrary transactions:** *Please report items loaned and borrowed in answer to specific author, title, and subject requests. Do not include bulk loans or rotating collections loaned or borrowed by your library. Please report items loaned and borrowed for the following years if figures are available. If no materials were loaned or borrowed, indicate 0. If statistics are not available, indicate NA.*

Loaned:	1970	_____	Borrowed:	1970	_____
	1971	_____		1971	_____
	1972	_____		1972	_____
	1973	_____		1973	_____
	1974	_____		1974	_____
	1975	_____		1975	_____

c. **Bulk loans:** Number of items in rotating and/or bulk loan collections loaned from your library. *Please do not report the actual or estimated circulation of these items within the library, school or other organization receiving the bulk loan.* _____

7. Did your library change your circulation policy or your method of recording interlibrary statistics between 1970-1975?
Yes_____: How did you do this?____
No______ ____
____

8. Please indicate which of the following you belong to or contract with on a formal basis, if any. *(Check all that apply)*

_____State funded public library system
_____Legally incorporated intertype library council (NEWIL, MALC, LCOMM, TLC)
_____Health science library network
_____WILS (Wisconsin Interlibrary Loan Service)
_____OCLC (Ohio College Library Center)
_____CESA (Cooperative Educational Service Agency) library/media services
_____ACM (Associated Colleges of the Midwest) periodical bank
_____Other (Specify) ____
_____Do not belong to or contract with any library system, network, or consortium.

9. Which of the following activities, if any, do you contract for or engage in with another library or library service organization on a formal or informal basis? *(Check all that apply)*

_____Interlibrary loan
_____Interlibrary reference
_____Reciprocal borrowing
_____Cooperative material selection
_____Cooperative material purchasing
_____Cooperative material processing
_____Cataloging
_____Publicity/Public relations
_____Continuing education & training opportunities
_____Consulting
_____Delivery Services
_____Other (Specify) ____
_____Do not contract for or engage in any cooperative activities

10. What category(ies) of library user(s) would you classify as your primary clientele? (Check all that apply)

____Student - elementary
____Student - secondary
____Student - university or college
____Business or industrial professional or research staff
____Medical professionals
____Teachers, faculty or research staff
____Government officials or legal professionals
____General public
____Other (Specify)____

11. What is your estimate as to the number of people whom you would not include in your primary clientele who use your library directly each month?

____None
____1 - 4 each month
____5 - 24 each month
____25 - 99 each month
____100 - 500 each month
____Over 500 each month

12. Please indicate if you allow on site use or direct loan of materials to any of the following categories of library users whom you do not consider as part of your primary clientele.

On Site Use	Direct Loan	Type of Patron
____	____	Student - elementary
____	____	Student - secondary
____	____	Student - university or college
____	____	Business or industrial professional or research staff
____	____	Medical professional
____	____	Teachers, faculty or research staff
____	____	Government officials or legal professionals
____	____	General public
____	____	Other (Specify)____________________

13. If you have a policy which prohibits loan, or if you discourage loan to any of the above categories of library users, please give the category of user and comment on the reason for that policy or practice.________________
____
____
____
____
____

14. Please check the type(s) of material your library has difficulty in obtaining for patrons, if any. *(Check all that apply)*

____Books
____Technical reports
____Government documents
____Periodical articles
____Films
____Filmstrips
____Records
____Audio tapes
____Materials on microfilm or microfiche
____Multimedia kits
____Maps
____Video Cassettes
____No need for materials outside our collection
____Other (Specify)____

15. Please check the subject area(s) in which your library has difficulty in obtaining materials to meet library user demands, if any. *(Check all that apply)*

____Science and Technology
____Medicine
____Law
____Education or curriculum related materials
____Literature
____Art
____Genealogy
____History and social studies
____No need for materials outside our collection
____Other (Specify) ____

16. Does your library place any of the following restrictions on audio-visual materials when lending to other libraries?

____Will not loan to other libraries
____Will loan for regular loan period
____Will loan for limited time period
____Will loan only by special arrangement
____Other (Specify) ____

17. **Please estimate the frequency of borrowing items directly from the following sources.** *(If materials are borrowed through one of these sources, indicate only the source with which you made* ***initial contact****.)*

	Times Per Month						
	None	1 - 9	10 - 49	50 - 99	100-249	250-500	over 500
WILS							
Reference and Loan Library (Madison)							
Public Library System Headquarters (State funded)							
Other Public Library							
University or College Library							
Special Library							
School District Media Center							
Other School Library							
CESA Library/ Media Services							
Other (Specify)							

18. Indicate which level of union list of periodicals, if any, you have in your library. Include union lists which list holdings of one type of library as well as those which list holdings of several types of libraries. *(Check all that apply)*

____Local union list of periodicals (one city)
____Regional union list of periodicals (county or multi-county)
____Statewide union list of periodicals
____Other (Specify) ________________________________
____No union lists of periodicals in library

19. Please indicate how useful each level of union list of periodicals is to your library.

	Not useful	Useful	Very useful	No opinion
Local	____	____	____	____
Regional	____	____	____	____
Statewide	____	____	____	____
National	____	____	____	____

20. A number of librarians have proposed creating a union list of periodicals including the holdings of selected libraries of all types and sizes in Wisconsin. Please indicate how useful you would find this union list.

____Not useful
____Useful
____Very useful
____No opinion

In questions 21, 22, 23, and 24, the term reference question includes requests for simple and complex factual information as well as requests for materials on a specific subject.

21 What is your library's policy, if any, concerning accepting reference or interlibrary loan requests from other libraries?

_____Will accept verified author, title requests
_____Will accept unverified author, title requests
_____Will accept subject requests
_____Will compile subject bibliographies
_____Will accept simple fact reference questions
_____Will accept in depth reference questions

22. Please indicate level of staffing available to answer reference questions.

_____Librarian available all hours library is open
_____Other staff member available all hours the library is open
_____Staff member available less than 1/2 the time the library is open
_____No staff member available to answer reference questions.
_____Other (Specify)____

23. If you cannot answer a reference question, which action do you take most often? *(One answer only)*

_____Refer library user to another library
_____Refer library user to non-library source
_____Make arrangements for a library user to use another library
_____Obtain information from another library for the library user
_____Obtain information from a non-library source for the library user
_____Tell library user that you cannot provide further help
_____Other (Specify) ____

24. Please estimate how often you contact the following libraries or institutions for help in answering reference questions.

	Never	Several Times a Day	Several Times a Week	Several Times a Month	Several Times a Year
Reference and Loan Library (Madison)					
Public Library System Headquarters (State Funded)					
Other Public Library					
University or College Library					
Special Library					
School District Media Center					
Other School Library					
CESA Library/ Media Services					
Government Office					
Other (Specify)					

25. Please check the best description of the frequency with which you use the following means of communication when sending a request for material or reference information outside the library.

	Rarely	Occasionally	Frequently	Do Not Own Or Have Access To
Mail				
TWX or teletype				
Computer terminal				
Local telephone				
Long distance telephone				
Other (Specify)				

26. Please check the best description of the frequency with which you use the following means of communication when sending materials to another library.

	Never	Rarely	Occasionally	Frequently
Mail				
Delivery van or truck (regular route)				
Bus				
Personal Messenger				
Other (Specify)				

27. Does your library now utilize or plan to utilize a computer for any of the following functions within the next 5 years? (*Check all that apply*)

_____ Circulation
_____ Acquisition
_____ Bibliographic control or union list of books
_____ Bibliographic control or union list of periodicals
_____ Cataloging
_____ Information retrieval (include subscription to commercial data base)
_____ Selective dissemination of information
_____ Teaching library use skills
_____ Other (Specify) ____

28. Can your library provide either direct or referral access for your users to computerized data bases free or for a charge?

Free? Yes____ No____
For a charge? Yes____ No____
If yes, through what library or library service organization can you provide access to or arrange for searching of computerized data bases?

____
____
____
____
____
____

29. If you cannot or do not provide access or arrange for searching computerized data bases, indicate what level of usefulness this service would be to your library users, if available.

Not useful____ Useful____ Very useful____ No opinion____

30. Please estimate the frequency with which your library requests a computerized search from another library or library service organization or refers library users to another library for a computer search.

_____ 0 - 4 times a year
_____ 5 - 24 times a year
_____ 25 - 99 times a year
_____ over 100 times a year

Person filling out form (optional)______________________________

Position ______________________________

Please fold, staple and return to Sally Drew, Task Force Coordinator, 126 Langdon Street, Madison, Wisconsin. No stamp is necessary.

THANK YOU!

State of Wisconsin \ DEPARTMENT OF PUBLIC INSTRUCTION

Barbara Thompson, Ph.D.
State Superintendent

Dwight M. Stevens, Ph.D.
Deputy State Superintendent

DIVISION FOR LIBRARY SERVICES
W. Lyle Eberhart, Assistant Superintendent
126 Langdon Street
Madison, Wisconsin 53702

January 30, 1976

Dear Librarian,

Many librarians today are faced with frustration in trying to meet increasing demands for services in the face of constantly rising costs and tighter budgets. Recent developments throughout the country suggest that cooperative projects and shared resources may provide some solutions to these problems.

The Wisconsin Division for Library Services in conjunction with the Council on Library Development has established a Task Force on Interlibrary Cooperation and Resource Sharing whose 45 members were chosen to represent libraries of varying type, size, and geographic region, and library associations, organizations, and specialized projects. Funded by Title I of the Library Services and Construction Act, the Task Force hopes to formulate and recommend an action-oriented program for statewide interlibrary cooperation and resource sharing.

The enclosed survey is designed to assist the Task Force in its work by providing basic information on interlibrary loan and interlibrary reference volume and referral patterns between all types of libraries. Documentation of present cooperative patterns and needs will prove extremely helpful to the Task Force in planning for the future on a statewide basis. This is your opportunity to assist by providing information as viewed from your type of library and your area of the state. Whether or not your library will be affected by such statewide planning, please give us the benefit of your professional experience and judgment. The information from this survey will be used in conjunction with case studies and in depth interviews to provide as full a picture as possible of library interaction in Wisconsin.

All replies to this survey will be treated with the strictest confidence. The name of your library is requested to help us avoid sending you an unnecessary follow-up questionnaire. Questionnaires have code numbers to facilitate computer analysis. Fold and staple the questionnaire and return to Sally Drew, Task Force Coordinator, at your earliest convenience. No stamp is necessary.

I hope that you will join with the other academic, school, public, and special libraries in the state in responding to this survey. All respondents will receive a copy of the final report of the Task Force scheduled for completion by June 30, 1976.

Sincerely,

W. Lyle Eberhart

W. Lyle Eberhart, Administrator

Bureau of
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3030 Darbo Drive
Madison, Wisconsin 53714

Bureau of
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3030 Darbo Drive
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State of Wisconsin \ DEPARTMENT OF PUBLIC INSTRUCTION

Barbara Thompson, Ph.D.
State Superintendent

Dwight M. Stevens, Ph.D.
Deputy State Superintendent

DIVISION FOR LIBRARY SERVICES
W. Lyle Eberhart, Assistant Superintendent
126 Langdon Street
Madison, Wisconsin 53702

March 3, 1976

Dear Librarian:

In early February the Task Force on Interlibrary Cooperation and Resource Sharing sent out a questionnaire designed to collect basic information on interlibrary loan and interlibrary reference volume and referral patterns between all types of libraries. To date, a response has not been received from your library. We are enclosing another questionnaire and urge you to take the time to complete and return it.

The information gathered in this study will be very useful for planning and developing library services in Wisconsin. It is important to the work of the Task Force to receive a reply even if your library does not engage in interlibrary loan or other cooperative activities.

We hope to be able to have this information analyzed and returned to the Task Force by Mid-April. An answer from your library by March 15 will help make this deadline possible.

Sincerely,

W. Lyle Eberhart

W. Lyle Eberhart,
Administrator

WLE:rm

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RESEARCH STATISTICAL TABLES

The following tables provide detailed information obtained from the survey questionnaire. The charts are in the approximate sequence in which they are discussed in Chapter 4. For each table N and R numbers are given, N indicating the total number of questionnaires returned and R indicating the number of respondents for each particular question. In the charts showing the breakdown of data by type of library, the library category reflects the way in which a library categorized itself when answering the questionnaire. The special library category includes both special libraries connected or affiliated with a college or university and special libraries affiliated with governmental, medical, business or industrial institutions. When not classified separately as VTAE, vocational/technical and adult education libraries are included with academic libraries. Other comments are used as needed to explain the data.

NUMBER OF BOOKS OWNED

Survey Question 4a N=845 R=782

	Type of library				
Number of books	Special	Academic	Public	School	Total
Less then 1,000	55	0	6	2	63
1,000 to 4,999	69	1	47	37	154
5,000 to 8,999	25	2	49	92	168
9,000 to 12,999	15	2	45	69	131
13,000 to 20,999	19	10	46	47	122
21,000 to 45,999	8	18	32	11	69
46,000 to 100,999	12	7	23	1	43
101,000 and over	7	23	18	0	48
Total	210	63	266	259	798

NUMBER OF PERIODICALS TITLES CURRENTLY RECEIVED

Survey Question 4b N=485 R=782

	Type of library				
Number received	Special	Academic	Public	School	Total
Less than 100	133	1	197	189	520
100 to 199	24	5	35	58	122
200 to 299	22	14	11	4	51
300 to 599	18	20	14	1	53
600 and above	10	22	4	0	36
Total	207	62	261	252	782

NUMBER OF AUDIOVISUAL MATERIALS OWNED

Survey Question 4c N=845 R=740

	Type of library				
Number of items in collection	Special	Academic	Public	School	Total
Less than 100	104	5	86	11	206
100 to 299	34	7	66	15	122
300 to 699	20	3	55	34	112
700 to 1,599	11	8	17	73	109
1,600 to 3,999	6	11	17	49	83
3,100 to 5,999	2	5	8	34	49
5,100 and over	7	19	17	16	59
Total	184	58	266	232	740

SIZE OF STAFF

Survey Question 5 N=845 R=802

Number of staff members	Special	Academic	Public	School	Total
	Type of library				
None	25	0	8	5	38
Less than 1	43	1	15	34	93
1 to 1.9	72	6	137	127	342
2 to 2.9	30	5	31	67	133
3 to 4.9	18	16	27	27	88
4 to 9.9	13	13	16	8	50
10 or more	8	21	29	0	58
Total	209	62	263	268	802

CIRCULATION

Survey Question 6a N=845 R=627

Items circulated	Special	Academic	Public	School	Total
	Type of library				
Less than 1,000	57	2	9	9	77
1,000 to 5,999	36	5	47	21	109
6,000 to 10,999	11	8	48	21	88
11,000 to 29,999	11	18	67	73	169
30,000 to 75,999	8	15	54	30	107
76,000 and over	4	11	48	14	77
Total	127	59	273	168	627

PRIMARY CLIENTELE

Survey Questions 10 and 3 N=845 R=843

Category of User	Special	Academic	Public	Elementary	JHS & SHS	VTAE	TOTAL
	Participating libraries						
Student, elementary	14	0	216	117	37	0	385
Student, secondary	22	1	204	13	138	2	380
Student, university or college	104	50	88	8	7	13	270
Business or industry	58	5	31	0	2	5	101
Medical professionals	70	0	8	0	1	2	81
Teachers, faculty	88	41	77	92	99	12	409
Government officials or legal	37	5	17	0	2	0	61
General public	27	5	268	1	7	3	311

ESTIMATE OF DIRECT LIBRARY USE BY USERS NOT INCLUDED IN PRIMARY CLIENTELE

Survey Questions 11 and 3 N=845 R=775

Times per month	Special	Academic	Public	Elementary	JHS & SHS	VTAE	TOTAL
	Type of library						
None	57	1	53	37	40	2	190
1 to 4 each month	62	9	64	41	46	0	222
5 to 24 each month	62	13	83	22	40	8	228
25 to 29 each month	21	13	33	3	9	2	81
100 to 500 each month	7	10	9	3	4	1	34
Over 500 each month	4	3	3	5	5	0	20
Total	213	49	245	111	144	13	775

ACCESS TO LIBRARIES BY ELEMENTARY SCHOOL STUDENTS*

Survey Questions 12 and 3 N=845 R=not available due to coding method

Type of library	Type of use	
	On-site use	Direct loan
Special	53	11
Academic	22	15
Public	20	23
Elementary school	-	-
JHS & SHS	27	38

*These libraries did not list elementary students as part of their primary clientele.

ACCESS TO LIBRARIES BY SECONDARY SCHOOL STUDENTS*

Survey Questions 12 and 3 N=845 R=not available due to coding method

Type of library	Type of use	
	On-site use	Direct loan
Special	75	19
Academic	35	24
Public	20	25
Elementary school	22	39
JHS & SHS	5	12

*These libraries did not list secondary students as part of their primary clientele. The figures under JHS & SHS may be due to libraries serving either JHS or SHS students, but not both.

ACCESS TO LIBRARIES BY COLLEGE OR UNIVERSITY STUDENTS*

Survey Questions 12 and 3 N=845 R=not available to to coding method

Type of library	Type of use	
	On-site use	Direct loan
Special	69	21
Academic	4	6
Public	48	72
Elementary school	18	23
JHS & SHS	40	55

*These libraries did not list post-secondary students as part of their primary clientele.

ACCESS TO LIBRARIES BY TEACHERS, FACULTY OR RESEARCH STAFF*

Survey Questions 12 and 3 N=845 R=not available due to coding method

Type of library	Type of use	
	On-site use	Direct loan
Special	55	33
Academic	6	2
Public	55	81
Elementary school	10	14
JHS & SHS	18	30

*These libraries did not list teachers, faculty or research staff as part of their primary clientele.

ACCESS TO LIBRARIES BY MEDICAL PROFESSIONALS*

Survey Questions 12 and 3 N=845 R=not available due to coding method

Type of library	Type of use	
	On-site use	Direct loan
Special	49	24
Academic	25	30
Public	61	77
Elementary school	3	4
JHS & SHS	18	13

*These libraries did not list medical professionals as part of their primary clientele.

ACCESS TO LIBRARIES BY BUSINESS OR INDUSTRIAL PROFESSIONAL OR RESEARCH STAFF*

Survey Questions 12 and 3 N=845 R=not available due to coding method

Type of library	Type of use	
	On-site use	Direct loan
Special	82	31
Academic	31	32
Public	56	78
Elementary school	3	6
JHS & SHS	23	19

*These libraries did not list business or industrial professional or research staff members as part of their primary clientele.

ACCESS TO LIBRARIES BY GOVERNMENT OFFICIALS OR LEGAL PROFESSIONALS*

Survey Questions 12 and 13 N=845 R=not available due to coding method

Type of library	Type of use	
	On-site use	Direct loan
Special	76	34
Academic	23	34
Public	52	[illegible]3
Elementary school	3	4
JHS & SHS	20	15

*These libraries did not list government officials or legal professionals as part of their primary clientele.

ACCESS TO LIBRARIES BY THE GENERAL PUBLIC*

Survey Questions 12 and 3 N=845 R=not available due to coding method

Type of library	Type of use	
	On-site use	Direct loan
Special	77	28
Academic	32	31
Public	10	11
Elementary school	16	23
JHS & SHS	50	31

*These libraries did not list the general public as part of their primary clientele. The figures listed under public libraries may reflect surveys sent to system headquarters or other backup services which do not serve the public directly.

LIBRARY PARTICIPATION IN COOPERATIVE SYSTEMS

Survey Question 8 N=845 R=837

Library organization	Participating Libraries	
	Number	Percentage
State funded public library system	197	23%
Legally incorporated intertype library council (NEWIL, MALC, LCOMM, TLC)	157	19
Health science library network	69	8
WILS	163**	19
OCLC	16	2
CESA library media services	86	10
AMC periodical bank	3	*
County/multicounty public library cooperative	77	9
Other	24	3
Do not belong to or contract with any library system, network or consortium	251	30

*less than 1%

**Apparently, a number of libraries checked WILS even though their participation was through another organization. Only 48 libraries contract directly with WILS. This survey question did not ask respondents to make a distinction between direct and indirect participation or contact.

Percents total more than 100 since respondents could check more than one answer.

LIBRARY PARTICIPATION IN COOPERATIVE SYSTEMS

Survey Questions 8 and 3 N=845 R=837

Library organization	Type of library				
	Special	Academic	Public	School	Total
State funded public library system	14	3	148	32	197
Legally incorporated intertype library council (NEWIL, MALC, LCOMM, TLC)	66	30	27	34	157
Health science library network	55	8	3	2	68
WILS	30	47	56	30	163
OCLC	7	9	0	0	16
CESA	4	2	2	78	86
Do not belong to or contract with any library system, network or consortium.	79	6	46	120	251

LIBRARY PARTICIPATION IN COOPERATIVE ACTIVITIES

Survey Question 9 N=845 R=818

Cooperative activity	Participating libraries	
	Number	Percentage
Interlibrary loan	519	61%
Interlibrary reference	349	41
Reciprocal borrowing	273	32
Cooperative material selection	73	9
Cooperative material purchasing	88	10
Cooperative material processing	69	8
Cataloging	110	13
Publicity/public relations	89	11
Continuing education and training opportunities	152	18
Consulting	141	17

Delivery service	117	14
Other	18	2
Do not contract for or engage in any cooperative activities	212	25

Percents total more than 100 since respondents could check more than one answer.

LIBRARY PARTICIPATION IN COOPERATIVE ACTIVITIES

Survey Questions 9 and 3 N=845 R=818

Cooperative Activity	Type of library						
	Special	Academic	Public	Elem. School	JHS & SHS	VTAE	Total
Interlibrary loan	135	43	220	38	74	9	519
Interlibrary reference	102	21	154	15	50	7	349
Reciprocal borrowing	80	32	96	22	36	7	273
Cooperative materials selection	13	6	37	6	11	0	73
Cooperative materials purchase	11	4	50	7	16	0	88
Cooperative materials processing	6	5	41	7	10	0	69
Cataloging	23	18	47	11	11	0	110
Publicity/public relations	6	1	67	7	8	0	89
Continuing education	34	7	90	8	10	3	152
Consulting	33	3	76	8	21	0	141
Delivery service	32	4	64	9	18	0	117
Do not contract for or engage in any formal or informal cooperative activity	60	5	43	53	48	3	212

NUMBER OF ITEMS LOANED

Survey Question 6b N=845 R=672

Number of items loaned*	Type of library				
	Special	Academic	Public	School	Total
Statistics not available	77	16	41	114	248
Less than 10	58	13	93	93	257
10 to 59	22	4	27	9	62
60 to 259	13	9	11	3	36
260 to 759	10	8	8	0	26
760 to 3999	3	3	7	0	13
4,000 or more	4**	1***	7	0	11
Total usable responses	188	53	210	221	661

*If fiscal year was January 1 to December 31, 1975 figures were used. If fiscal year was July 1 to June 30, 1974-75 figures were used.

**These four libraries include three academic libraries affiliated with a college or university and the Reference and Loan Library.

***WILS statistics are reflected here. WILS utilizes UW-Madison libraries to fill requests.

NUMBER OF ITEMS BORROWED

Survey Question 6b N=845 R=723

Number of items borrowed, 1975*	Type of library Special	Academic	Public	School	Total
Statistics not available	73	11	28	117	229
Less than 10	49	7	15	81	152
10 to 49	21	3	22	15	61
50 to 109	12	3	29	7	51
110 to 359	19	7	58	5	89
360 to 999	12	13	65	0	90
1,000 to 1,999	7	4	20	0	31
2,000 and over	5	6	9	0	20
Total usable responses	198	54	246	225	723

*If fiscal year was January 1 to December 31, 1975 figures were used.
If fiscal year was July 1 to June 30, 1974-75 figures were used.

BULK LOANS

Survey Question 6c N=845 R=618

Number of items loaned	Type of library Special	Academic	Public	School	Total
Statistics not available	36	7	17	44	104
Less than 10 items	124	37	119	142	422
10 items or more	4	0	80	8	92
Total	164	44	216	194	618

FREQUENCY OF BORROWING ITEMS FROM WILS*

Survey Questions 17 and 3 N=845 R=257

Items borrowed per month	Type of library Special	Academic	Public	Elementary school	JHS & SHS	VTAE
None	69	4	21	30	37	3
1 to 9	6	2	21	1	8	1
10 to 49	2	15	12	0	1	0
50 to 99	0	6	2	0	0	0
100 to 249	0	5	3	0	0	0
250 to 500	1	5	0	0	0	0
Over 500	1	1	0	0	0	0
Total	79	38	59	31	47	4

*Figures reflect indirect loans from WILS. School, public, VTAE and most special libraries only have access to WILS through the Reference and Loan Library.

FREQUENCY OF BORROWING ITEMS FROM REFERENCE AND LOAN

Survey Questions 17 and 3 N=845 R=459

Items borrowed per month	Type of library Special	Academic	Public	Elementary school	JHS & SHS	VTAE
None	85	22	14	54	50	3
1 to 9	28	8	59	13	44	7
10 to 49	8	4	27	1	6	0
50 to 99	5	1	9	0	0	0
100 to 249	5	0	4	0	0	0
250 to 500	0	0	2	0	0	0
over 500	0	0	0	0	0	0
Total	131	35	115	68	100	10

FREQUENCY OF BORROWING ITEMS FROM PUBLIC LIBRARY SYSTEM HEADQUARTERS

Survey Questions 17 and 3 N=845 R=458

Items borrowed per month	Type of library Special	Academic	Public	Elementary school	JHS & SHS	VTAE
None	88	26	16	49	55	4
1 to 9	24	6	44	9	25	3
10 to 49	5	1	63	2	1	0
50 to 99	2	1	18	1	1	0
100 to 249	0	0	7	0	0	0
250 to 500	0	0	3	0	0	0
Over 500	0	0	4			
Total	119	34	155	61	82	7

FREQUENCY OF BORROWING ITEMS FROM
PUBLIC LIBRARIES (OTHER THAN SYSTEM HEADQUARTERS)

Survey Questions 17 and 3 N=845 R=406

Items borrowed per month	Type of library Special	Academic	Public	Elementary school	JHS & SHS	VTAE
None	81	9	21	33	45	2
1 to 9	31	19	39	24	40	5
10 to 49	9	4	12	3	8	2
50 to 99	1	0	4	2	1	0
100 to 249	0	0	6	1	0	0
250 to 500	0	0	2	0	1	0
Over 500	1	0	0	0	0	0
Total	123	32	84	63	95	9

FREQUENCY OF BORROWING ITEMS FROM UNIVERSITY OR COLLEGE LIBRARIES

Survey Questions 17 and 3 N=845 R=388

Items borrowed per month	Type of library Special	Academic	Public	Elementary school	JHS & SHS	VTAE
None	55	5	25	45	48	2
1 to 9	58	18	18	14	25	6
10 to 49	24	11	5	0	6	1
50 to 99	4	1	2	1	1	0
100 to 249	5	2	0	0	0	0
250 to 500	3	0	0	0	1	0
Over 500	0	2	0	0	0	0
Total	149	39	50	60	81	9

FREQUENCY OF BORROWING ITEMS FROM SPECIAL LIBRARIES

Survey Questions 17 and 3 N=845 R=333

Items borrowed per month	Type of library Special	Academic	Public	Elementary school	JHS & SHS	VTAE
None	62	17	30	51	55	4
1 to 9	46	10	10	1	9	3
10 to 49	25	3	0	0	2	0
50 to 99	3	0	1	0	0	0
100 to 249	0	0	0	0	0	0
250 to 500	1	0	0	0	0	0
Over 500	0	0	0	0	0	0
Total	137	30	41	52	66	7

FREQUENCY OF BORROWING ITEMS FROM SCHOOL LIBRARIES

Survey Questions 17 and 3 N=845 R=350

Items borrowed per month	Type of library Special	Academic	Public	Elementary school	JHS & SHS	VTAE
None	96	23	32	29	35	6
1 to 9	7	5	8	40	44	0
10 to 49	0	0	1	14	7	1
50 to 99	0	0	0	0	2	0
100 to 249	0	0	0	0	0	0
250 to 500	0	0	0	0	0	0
Over 500	0	0	0	0	0	0
Total	103	28	41	83	88	7

FREQUENCY OF BORROWING ITEMS FROM SCHOOL DISTRICT MEDIA CENTERS

Survey Questions 17 and 3 N=845 R=322

	Type of library					
Items borrowed per month	Special	Academic	Public	Elementary school	JHS & SHS	VTAE
None	97	27	32	28	50	6
1 to 9	5	0	6	19	20	1
10 to 49	0	0	1	17	4	0
50 to 99	0	0	0	2	2	0
100 to 249	0	0	0	4	0	0
250 to 500	0	0	0	0	1	0
Over 500	0	0	0	0	0	0
Total	102	27	39	70	77	7

FREQUENCY OF BORROWING ITEMS FROM CESA LIBRARY MEDIA CENTERS

Survey Questions 17 and 3 N=845 R=326

	Type of library					
Items borrowed per month	Special	Academic	Public	Elementary school	JHS & SHS	VTAE
None	99	27	32	39	44	7
1 to 9	3	1	5	21	27	0
10 to 49	0	0	0	6	11	0
50 to 99	0	0	0	1	1	0
100 to 249	0	0	0	1	0	0
250 to 500	1	0	0	0	0	0
Over 500	0	0	0	0	0	0
Total	103	28	37	68	83	7

MATERIALS DIFFICULT TO OBTAIN

Survey Question 14 N=845 R=not available due to method of coding multiple responses.

Type of material	Number of libraries	Percentage of Libraries
Books	49	6%
Technical reports	103	12
Government documents	93	11
Periodical articles	73	9
Films	91	11
Filmstrips	69	8
Records	49	6
Audio tapes	56	7
Microfilm/microfiche	50	6
Multimedia kits	69	8
Maps	36	4
Video cassettes	71	8
Reference books	8	*
Other	16	2
No need for materials outside collection	153	18

*less than one percent

MATERIALS DIFFICULT TO OBTAIN BY SUBJECT AREA

Survey Question 15 N=845 R=not available due to method of coding multiple responses

Subject area	Number of libraries	Percentage of libraries
Science and technology	106	12%
Medicine	63	8
Law	67	8
Education or curriculum related materials	71	8
Literature	25	3
Art	19	2
Genealogy	80	10
History and social studies	59	7
Religion	4	*
Other	23	3
No need for materials outside collection	156	18

*less than one percent

MATERIALS DIFFICULT TO OBTAIN BY TYPE OF LIBRARY

Survey Questions 14 and 3 N=845

R=not available due to method of coding multiple responses

	Type of library						
Materials	Special	Academic	Public	Elem. school	JHS SHS	VTAE	Total
Book	12	1	17	11	6	2	49
Technical reports	24	12	41	5	19	2	103
Government documents	35	8	25	5	14	6	93
Periodical articles	16	2	17	12	24	2	73
Films	17	4	40	10	18	2	91
Filmstrips	8	4	37	11	8	1	69
Records	6	8	19	10	5	1	49
Audio tapes	7	3	30	7	8	1	56
Materials on Microfilm or microfiche	7	2	28	4	8	1	50
Multimedia kits	11	5	29	12	11	1	69
Maps	7	3	13	6	5	2	36
Video cassettes	13	4	27	13	12	2	71
No need for outside materials	43	5	28	38	37	2	153

MATERIALS DIFFICULT TO OBTAIN BY SUBJECT AREA AND TYPE OF LIBRARY

Survey Questions 15 and 3 N=845 R=not available due to method of coding multiple responses.

	Type of library						
Materials	Special	Academic	Public	Elem. school	JHS + SHS	VTAE	Total
Science & technology	17	8	34	22	23	2	106
Medicine	13	3	33	1	11	2	63
Law	15	2	29	1	17	3	67
Education or curriculum	10	2	24	15	19	1	71
Literature	3	0	5	6	9	2	25
Art	7	0	3	6	2	1	19
Genealogy	3	7	58	1	10	1	80
History & social studies	10	1	14	17	15	2	59
Other	6	4	5	5	6	1	27
No need for outside material	54	5	29	33	33	2	156

ACCEPTANCE FOR INTERLIBRARY LOAN AND REFERENCE REQUESTS

Survey Question 21 N=845 R=696

Form of request	Number of libraries	Percentage of libraries
Verified author/title	451	53%
Unverified author/title	300	36
Subject	339	40
Subject bibliography compilation	128	15
Simple fact reference	428	51
In-depth reference	155	18
Accept no interlibrary loan or reference requests	112	13

Percents total more than 100 since respondents could check more than one answer.

ACCEPTANCE FOR INTERLIBRARY LOAN AND REFERENCE REQUESTS BY TYPE OF LIBRARY

Survey Questions 21 and 3 N=845 R=696

	Type of library						
Form of request	Special	Academic	Public	Elem. school	JHS + SHS	VTAE	Total
Verified author/title	129	43	158	40	68	13	451
Unverified author/title	97	34	93	20	47	9	300
Subject	90	20	122	38	61	8	339
Subject bibliography compilation	36	7	34	15	31	5	128
Simple fact reference	135	38	144	32	69	10	428
In-depth reference	52	21	51	7	20	4	155
Do not accept interloan or reference requests	23	1	39	23	26	0	112

RESTRICTIONS ON INTERLIBRARY LOAN OF AUDIOVISUAL MATERIAL

Survey Questions 16 and 3 N=845 R=686

Restriction	Type of library Special	Academic	Public	Elem. school	JHS + SHS	VTAE	Total
Will not loan to other libraries	31	3	17	10	23	0	84
Will loan by special arrangement or for a limited time period	68	29	65	66	82	10	320
No restrictions on loan or will loan for a regular time period	76	18	132	28	26	2	282
Total	175	50	214	104	131	12	686

COMPARISON BETWEEN SIZE OF AUDIOVISUAL MATERIALS COLLECTION AND NUMBER OF ITEMS BORROWED

Survey Questions 4c and 6b N=845 R=434

Percentages are based on R=434

	Number of items in collection								
	Less than 100		100 to 899		700 to 3,099		3,100 & over		
Number of items borrowed	#	%	#	%	#	%	#	%	Total
Less than 10	43	(10)	28	(6)	44	(10)	11	(3)	126
10 to 109	40	(9)	40	(9)	18	(4)	8	(2)	106
110 to 359	18	(4)	47	(11)	13	(3)	6	(1)	84
360 to 999	17	(4)	23	(5)	14	(3)	17	(4)	71
1,000 and over	3	(1)	11	(3)	16	(4)	17	(4)	47
Total	121		149		105		59		434

COMPARISON BETWEEN SIZE OF PERIODICAL COLLECTION AND NUMBER OF ITEMS BORROWED

Survey Qestions 4b and 6b N=845 R=458

Percentages are based on R=458

	Number of items in collection								
Number of items borrowed	Less than 100		100 to 200		200 to 599		600 and over		Total
	#	%	#	%	#	%	#	%	
Less than 10	108	(24)	21	(5)	7	(2)	1	(*)	137
10 to 109	83	(18)	12	(3)	4	(1)	0		99
110 to 359	54	(12)	19	(4)	9	(2)	3	(1)	85
360 to 999	40	(9)	20	(4)	18	(4)	9	(2)	87
1,000 and over	13	(3)	7	(2)	16	(3)	14	(3)	50
Total	298		79		54		27		458

*less than 1%.

COMPARISON BETWEEN SIZE OF BOOK COLLECTION AND NUMBER OF ITEMS BORROWED

Survey Questions 4a and 6b N=845 R=459

Percentages are based on R=459

Number of items borrowed	Number of items in collection										
	Less than 1,000		1,000 to 8,999		9,000 to 20,999		21,000 to 100,000		101,000 and over		Total
	#	%	#	%	#	%	#	%	#	%	
Less than 10	22	(5)	68	(15)	43	(9)	9	(2)	1	(*)	143
10 to 109	13	(3)	61	(13)	23	(15)	9	(2)	0		106
110 to 359	4	(1)	27	(6)	28	(6)	20	(4)	4	(1)	83
360 to 999	1	(*)	15	(3)	32	(7)	26	(6)	14	(3)	88
1,000 and over	0		7	(2)	10	(2)	13	(3)	9	(2)	39
Total	40		178		136		77		28		459

*less than 1%.

COMPARISON OF BOOK COLLECTION SIZE OF LIBRARIES
ENGAGING IN INTERLIBRARY LOAN

Survey Questions 4a and 9 N=845 R=798

Book Collection Size		Engage in interlibrary loan		Do not engage in any cooperative activities	
Number of items in collection	Number of libraries in category	Number of libraries	Percentage of libraries	Number of libraries	Percentage of libraries
Less than 1,000	63	30	48%	20	32%
1,000 to 4,999	154	80	52	47	31
5,000 to 8,999	168	93	55	41	24
9,000 to 12,999	131	81	62	36	27
13,000 to 20,999	122	77	63	33	27
21,000 to 45,999	69	51	74	13	19
46,000 to 100,999	43	36	84	3	7
101,000 and over	48	44	92	3	6

COMPARISON OF NUMBER OF PERIODICAL TITLES CURRENTLY RECEIVED
FOR LIBRARIES ENGAGING IN INTERLIBRARY LOAN

Survey Questions 4b and 9 N=845 R=782

Periodical Collection Size		Engage in interlibrary loan		Do not engage in any cooperative activities	
Titles currently received	Number of libraries in category	Number of libraries	Percentage of libraries	Number of libraries	Percentage of libraries
Less than 100	520	291	56%	152	29%
100 to 199	122	85	70	22	18
200 to 299	51	40	78	5	10
300 to 599	53	44	83	5	9
600 and over	36	33	92	3	8

COMPARISON OF SIZE OF AUDIOVISUAL MATERIALS COLLECTIONS FOR LIBRARIES ENGAGING IN INTERLIBRARY LOAN

Survey Questions 4c and 9 N=845 R=740

Audiovisual Collection Size		Engage in interlibrary loan		Do not engage in any cooperative activities	
Number of items in collection	Number of libraries in category	Number of libraries	Percentage of libraries	Number of libraries	Percentage of libraries
Less than 100	206	126	61%	50	24%
100 to 299	122	83	68	28	23
300 to 699	112	81	72	21	19
700 to 1,599	109	58	53	34	31
1,600 to 3,099	83	47	57	22	27
3,100 to 5,099	49	32	65	9	18
5,100 and over	59	42	71	9	15

COMPARISON OF STAFF SIZE AND NUMBER OF ITEMS BORROWED

Survey questions 5 and 6b N=845 R=475

Percentages are based on R=475

	Staff size								
Number of items borrowed per year	Less than 1 #	Less than 1 %	1 to 1.9 #	1 to 1.9 %	2 to 4.9 #	2 to 4.9 %	more than 5 #	more than 5 %	Total
Less than 10	40	(8)	65	(14)	39	(8)	2	(*)	146
10 to 109	21	(4)	60	(13)	21	(4)	4	(1)	106
110 to 359	12	(3)	42	(9)	20	(4)	10	(2)	84
360 to 999	4	(1)	31	(7)	27	(6)	26	(5)	88
1,000 and over	0		7	(1)	12	(3)	32	(7)	51
Total	77		205		119		74		475

*less than 1%.

COMPARISON OF CIRCULATION SIZE FOR LIBRARIES ENGAGING IN INTERLIBRARY LOAN

Survey Questions 6 and 9 N=845 R=627

Circulation size		Engage in interlibrary loan		Do not engage in any cooperative activities	
Number of items circulated	Number of libraries in category	Number of libraries	Percentage of libraries	Number of libraries	Percentage of libraries
Less than 1,000	77	36	47%	24	31%
1,000 to 5,999	109	73	67	21	19
6,000 to 10,000	88	54	61	23	26
11,000 to 29,999	169	111	66	39	23
30,000 to 75,999	107	80	75	22	21
76,000 and over	77	62	81	9	12

COMPARISON OF STAFF SIZE OF LIBRARIES ENGAGING IN INTERLIBRARY LOAN

Survey Questions 5 and 9 N=845 R=802

Staff size		Engage in interlibrary loan		Do not engage in any cooperative activities	
Number of staff members	Number of libraries in category	Number of libraries	Percentage of libraries	Number of libraries	Percentage of libraries
None	38	12	32%	21	55%
Less than 1	93	46	50	26	28
1 to 1.9	342	198	58	101	30
2 to 2.9	133	80	60	36	27
3 to 4.9	88	72	82	9	10
5 to 9.9	50	38	76	8	16
10 or more	58	53	91	2	3

UNION LISTS OF PERIODICALS HELD

Survey Question 18 N=845 R=761

Level of union list held	Number of libraries	Percentage of libraries
Local union list of periodicals (one city)	173	20%
Regional union list of periodicals (county or multicounty)	141	17
Statewide union list of periodicals	70	8
Mulitstate or union lists of periodicals from other states	29	3
National	30	4
No union list of periodicals held	444	53

Percents total more than 100 since respondents could check more than one answer.

USEFULNESS OF WISCONSIN UNION LIST OF PERIODICALS

Survey Question 20 N=845 R=791

Librarian's estimate of usefulness	Number of libraries	Percentage of libraries
Very useful	124	14%
Useful	263	31
Not useful	218	26
No opinion	186	22

UNION LIST OF PERIODICALS HOLDINGS BY TYPE OF LIBRARY

Survey Questions 18 and 3 N=845 R=762

	Type of library						
Type of union list of periodicals	Special	Academic	Public	Elem. school	JHS + SHS	VTAE	Total
Local union list	62	24	43	6	31	7	173
Regional union list	52	19	48	2	15	5	141
Statewide union list	40	16	3	2	6	3	70
No union list	90	3	158	95	97	1	444
Total	203	50	249	106	142	12	762

USEFULNESS OF WISCONSIN UNION LIST OF PERIODICALS BY TYPE OF LIBRARY

Survey Questions 20 and 3 N=845 R=791

Librarians' estimate of usefulness	Special	Academic	Public	Elem. school	JHS + SHS	VTAE	Total
	Type of library						
Very useful	49	25	34	4	8	4	124
Useful	67	15	74	36	62	9	263
Not useful	56	5	64	45	48	0	218
No opinion	38	4	86	28	30	0	186

COMPARISON BETWEEN USEFULNESS OF THE WISCONSIN UNION LIST OF PERIODICALS AND AMOUNT OF INTERLIBRARY BORROWING OF MATERIALS

Survey Questions 6b and 20 N=845 R=723

Number of items borrowed, 1975	Very useful	Useful	Not useful	No opinion	Not ascertained	Total
	Librarians' estimate of usefulness					
Statistics not available	10%	34%	29%	23%	4%	100%
Less than 10	7	26	34	26	7	100%
10 to 49	23	20	28	23	6	100%
50 to 109	14	29	24	29	4	100%
110 to 359	20	34	15	23	8	100%
360 to 999	22	43	10	20	5	100%
1,000 to 1,999	32	39	19	0	10	100%
2,000 and over	50	20	20	10	0	100%

FREQUENCY OF REFERENCE QUESTION REFERRAL TO THE REFERENCE AND LOAN LIBRARY

Survey Questions 24 and 3 N=845 R=529

Frequency of contact	Special	Academic	Public	Elem. school	JHS + SHS	VTAE	Total
	Type of library						
Several times a day	2	0	9	0	0	0	11
Several times a week	6	1	18	0	2	0	27
Several times a month	17	2	27	3	10	1	60
Several times a year	34	13	44	9	28	6	134
Never	93	26	38	68	68	4	297
Total	152	42	136	80	108	11	529

FREQUENCY OF REFERENCE QUESTION REFERRAL TO PUBLIC LIBRARY SYSTEM HEADQUARTERS

Survey Questions 24 and 3 N=845 R=523

Frequency of contact	Type of library: Special	Academic	Public	Elem. school	JHS + SHS	VTAE	Total
Several times a day	3	0	14	0	1	0	18
Several times a week	4	0	46	0	0	0	50
Several times a month	11	2	55	4	11	1	84
Several times a year	14	12	26	14	17	0	83
Never	98	27	26	64	69	4	288
Total	130	41	167	82	98	5	523

FREQUENCY OF REFERENCE QUESTION REFERRAL TO PUBLIC LIBRARIES (OTHER THAN SYSTEM HEADQUARTERS)

Survey Questions 24 and 3 N=845 R=507

Frequency of contact	Type of library: Special	Academic	Public	Elem. school	JHS + SHS	VTAE	Total
Several times a day	2	0	6	0	1	0	9
Several times a week	8	1	14	1	4	1	29
Several times a month	34	10	22	9	19	4	98
Several times a year	41	20	37	53	56	6	213
Never	64	9	26	27	31	1	158
Total	149	40	105	90	111	12	507

FREQUENCY OF REFERENCE QUESTION REFERRAL TO UNIVERSITY OR COLLEGE LIBRARIES

Survey Questions 24 and 3 N=845 R=450

Frequency of contact	Type of library: Special	Academic	Public	Elem. school	JHS + SHS	VTAE	Total
Several times a day	7	1	1	1	2	0	12
Several times a week	18	7	2	0	0	0	27
Several times a month	31	6	11	1	7	5	61
Several times a year	61	23	18	20	33	4	159
Never	40	4	37	55	54	1	191
Total	157	41	69	77	96	10	450

FREQUENCY OF REFERENCE QUESTION REFERRAL TO SPECIAL LIBRARIES

Survey Questions 24 and 3 N=845 R=404

Frequency of contact	Type of library						
	Special	Academic	Public	Elem. school	JHS + SHS	VTAE	Total
Several times a day	5	0	0	0	0	0	0
Several times a week	16	0	2	0	0	0	18
Several times a month	37	3	5	0	1	1	47
Several times a year	36	16	13	1	8	1	75
Never	53	18	44	68	73	3	259
Total	147	37	64	69	82	5	404

FREQUENCY OF REFERENCE QUESTION REFERRAL TO SCHOOL LIBRARIES

Survey Questions 24 and 3 N=845 R=419

Frequency of contact	Type of library						
	Special	Academic	Public	Elem. school	JHS + SHS	VTAE	Total
Several times a day	0	0	0	1	2	0	3
Several times a week	0	0	1	6	5	0	12
Several times a month	1	1	4	14	15	0	35
Several times a year	7	4	16	39	45	0	111
Never	110	29	45	31	37	6	258
Total	118	34	66	91	104	6	419

FREQUENCY OF REFERENCE QUESTION REFERRAL TO SCHOOL DISTRICT MEDIA CENTERS

Survey Questions 24 and 3 N=845 R=381

Frequency of contact	Type of library						
	Special	Academic	Public	Elem. school	JHS + SHS	VTAE	Total
Several times a day	0	0	0	2	0	0	2
Several times a week	0	1	0	5	1	0	7
Several times a month	0	0	4	19	7	0	30
Several times a year	7	0	12	16	10	1	46
Never	110	33	50	40	57	6	296
Total	117	34	66	82	75	7	381

FREQUENCY OF REFERENCE QUESTION REFERRAL TO CESA LIBRARY MEDIA SERVICES

Survey Questions 24 and 3 N=845 R=377

	Type of library						
Frequency of contact	Special	Academic	Public	Elem. school	JHS + SHS	VTAE	Total
Several times a day	1	0	0	0	0	0	1
Several times a week	0	0	0	1	0	0	1
Several times a month	0	0	1	3	8	0	12
Several times a year	1	0	3	13	17	0	34
Never	115	34	54	57	63	6	329
Total	117	34	58	74	88	6	377

FREQUENCY OF REFERENCE QUESTION REFERRAL TO GOVERNMENT OFFICES

Survey Questions 24 and 3 N=845 R=409

	Type of library						
Frequency of contact	Special	Academic	Public	Elem. school	JHS + SHS	VTAE	Total
Several times a day	2	0	1	0	1	0	4
Several times a week	8	0	1	0	0	0	9
Several times a month	11	3	9	0	0	0	23
Several times a year	43	19	18	2	15	4	101
Never	72	17	42	67	71	3	272
Total	136	39	71	69	87	7	409

REFERENCE QUESTION REFERRAL

Survey Question 23 N=845 R=789

Action taken most frequently	Number of libraries	Percentage of libraries
Refer user to another library	273	32%
Refer user to nonlibrary source	17	2
Make arrangements for user to use another library	22	3
Obtain information from another library for the user	358	42
Obtain information from a nonlibrary source for the user	19	2
Obtain information from another library or nonlibrary source for the user	44	5
Tell user that you cannot provide further help	29	3
Other action taken	27	3

REFERENCE QUESTION REFERRAL PATTERNS BY TYPE OF LIBRARY

Survey Questions 23 and 3 N=845 R=789

	Type of library						
Action taken most frequently	Special	Academic	Public	Elem. school	JHS + SHS	VTAE	Total
Refer user to another library	82	18	45	51	71	6	273
Refer user to nonlibrary source	9	1	4	2	1	0	17
Make arrangements for user to use another library	4	4	9	4	0	1	22
Obtain information from another library	71	14	176	39	55	3	358
Obtain information from nonlibrary source	11	3	3	0	2	0	19
Obtain information from another library/nonlibrary source	6	2	18	5	12	1	44
Tell user that you cannot provide further help	8	2	3	12	4	0	29
Other action taken	8	3	10	1	3	2	27
Total	199	47	268	114	148	13	789

REFERENCE SERVICE STAFFING PATTERNS

Survey Questions 22 and 3 N=845 R=790

	Type of library						
Staffing pattern	Special	Academic	Public	Elem. school	JHS + SHS	VTAE	Total
Librarian available all hours library is open	82	19	167	56	94	2	420
Librarian or other staff available all hours library is open	27	11	31	18	25	3	115
Other staff available all hours library is open	35	14	33	11	4	6	103
Staff available less than ½ time library is open	32	4	5	12	9	1	63
No staff available	23	0	15	5	8	0	51
Other staffing pattern	11	2	10	9	5	1	38
Total	210	50	261	111	145	13	790

COMPARISON BETWEEN LEVEL OF STAFFING FOR REFERENCE SERVICE AND TYPE OF REFERENCE SERVICES PROVIDED

Survey Questions 22 and 23 N=845 R=664

Action taken most frequently	Level of staffing Librarian all hours	Librarian or other staff all hours	Other staff all hours	Staff less than ½ hour	Total
Refer to another library	133	43	26	54	256
Refer to non-library source	8	3	3	1	15
Make arrangements to use another library	9	4	6	1	20
Obtain information from another library	197	46	46	37	326
Obtain information from a non-library source	9	1	6	1	17
Tell user you cannot help	16	5	2	7	30

COMPARISON BETWEEN LEVEL OF STAFFING FOR REFERENCE SERVICE AND TYPE OF REFERENCE REQUESTS ACCEPTED

Survey Questions 21 and 23 N=845 R=641

Type of requests	Level of staffing Librarian all hours	Librarian or other staff all hours	Other staff all hours	Staff less than ½ hour
Verified author/title	237	77	63	45
Unverified author/title	151	57	41	28
Subject requests	173	68	49	25
Subject bibliographies	68	26	17	6
Simple fact reference	210	77	19	46
In-depth reference	76	30	30	7
Do not accept interloan or reference requests	64	10	11	25

ACCESS TO COMPUTERIZED DATA BASES BY TYPE OF LIBRARY

Survey Questions 28 and 3 N=845 R=645

Type of access	Type of library Special	Academic	Public	Elem. school	JHS + SHS	VTAE	Total
Free	27	6	11	3	8	2	57
For a charge	68	10	9	5	12	3	107

FREQUENCY OF REFERRAL FOR COMPUTERIZED LITERATURE SEARCH

Survey Question 30 N=845 R=713

Frequency of referral	Number of libraries	Percentage of libraries
0 to 4 times a year	638	76%
5 to 25 times a year	54	6
25 to 99 times a year	14	2
over 100 times a year	7	1

FREQUENCY OF REFERRAL FOR COMPUTERIZED LITERATURE SEARCH BY TYPE OF LIBRARY

Survey Questions 30 and 3 N=845 R=713

	Type of library						
Frequency of referral	Special	Academic	Public	Elem. school	JHS + SHS	VTAE	Total
0 to 4 times a year	150	40	207	102	128	11	638
5 to 25 times a year	37	3	7	1	5	1	54
25 to 99 times a year	7	1	3	1	2	0	14
over 100 times a year	4	2	1	0	0	0	7

ESTIMATE OF USEFULNESS OF COMPUTERIZED INFORMATION RETRIEVAL

Survey Question 29 N=845 R=663

Level of usefulness	Number of libraries	Percentage of libraries
Very useful	24	3%
Useful	142	17
Not useful	268	32
No opinion	229	22

ESTIMATE OF USEFULNESS OF COMPUTERIZED INFORMATION RETRIEVAL

Survey Questions 29 and 3 N=845 R=663

	Type of library						
Level of usefulness	Special	Academic	Public	Elem. school	JHS + SHS	VTAE	Total
Very useful	8	5	5	0	5	1	24
Useful	33	13	32	20	37	7	142
Not useful	55	10	86	61	54	2	268
No opinion	41	12	114	23	38	1	229

FREQUENCY OF USE OF MAIL AS COMMUNICATION METHOD BY TYPE OF LIBRARY

Survey Questions 25 and 3 N=845 R=661

	Type of library						
Frequency	Special	Academic	Public	Elem. school	JHS + SHS	VTAE	Total
Frequently	104	28	178	22	43	4	379
Occasionally	39	11	37	17	30	6	140
Rarely	34	4	16	31	34	2	121
Do not own or have access to	3	1	7	5	4	1	21

FREQUENCY OF USE OF TWX OR TELETYPE AS COMMUNICATION METHOD BY TYPE OF LIBRARY

Survey Questions 25 and 3 N=845 R=485

	Type of library						
Frequency	Special	Academic	Public	Elem. school	JHS + SHS	VTAE	Total
Frequently	6	23	14	0	1	0	44
Occasionally	4	0	1	1	1	1	8
Rarely	19	1	2	9	8	0	39
Do not own or have access to	106	21	115	65	79	8	394

FREQUENCY OF USE OF COMPUTER TERMINAL AS A COMMUNICATION METHOD BY TYPE OF LIBRARY

Survey Questions 25 and 3 N=845 R=450

	Type of library						
Frequency	Special	Academic	Public	Elem. school	JHS + SHS	VTAE	Total
Frequently	5	1	0	0	0	0	6
Occasionally	6	0	1	0	2	0	9
Rarely	19	1	5	7	9	0	41
Do not own or have access to	99	31	115	66	75	8	394

FREQUENCY OF USE OF LOCAL TELEPHONE AS A COMMUNICATION METHOD BY TYPE OF LIBRARY

Survey Questions 25 and 3 N=845 R=633

	Type of library						
Frequency	Special	Academic	Public	Elem. school	JHS + SHS	VTAE	Total
Frequently	113	19	82	39	64	7	324
Occasionally	36	21	66	35	38	2	198
Rarely	20	8	25	17	16	1	87
Do not own or have access to	5	0	11	5	2	1	24

FREQUENCY OF USE OF LONG-DISTANCE TELEPHONE AS A COMMUNICATION METHOD BY TYPE OF LIBRARY

Survey Questions 25 and 3 N=845 R=560

	Type of library						
Frequency	Special	Academic	Public	Elem. school	JHS + SHS	VTAE	Total
Frequently	51	14	33	3	9	1	111
Occasionally	59	14	80	15	31	5	204
Rarely	49	17	57	37	36	5	201
Do not own or have access to	10	0	11	13	10	0	44

COMMUNICATION METHOD FOR SENDING REQUESTS

Survey Question 25 N=845 R=varied, percentage given under "Not ascertained."

	Frequency of use				
Communication means	Frequently	Occasionally	Rarely	Do not own or have access to	Not ascertained
Mail	45%	17%	14%	3%	22%
TWX or teletype	5	1	5	46	42
Computer terminal	*	1	5	47	47
Local telephone	38	23	10	3	25
Long-distance telephone	13	24	24	5	33

*less than 1%

DELIVERY METHOD FOR SENDING MATERIAL

Survey Question 26 N=845 R=varied, percentage given under "Not ascertained."

	Frequency of use				
Means of delivery	Frequently	Occasionally	Rarely	Never	Not ascertained
Mail	37%	15%	10%	16%	22%
Delivery van or truck (regular route	13	11	5	31	39
Bus	*	*	2	48	49
Personal Messenger	7	18	12	25	38

*less than 1%

FREQUENCY OF USE OF MAIL AS A DELIVERY METHOD BY TYPE OF LIBRARY

Survey Questions 26 and 3 N=845 R=660

	Type of library						
Frequency	Special	Academic	Public	Elem. school	JHS + SHS	VTAE	Total
Frequently	95	37	135	13	22	7	309
Occasionally	39	10	43	6	28	4	130
Rarely	22	1	16	16	29	1	85
Never	31	0	31	46	28	0	136

FREQUENCY OF USE OF DELIVERY VAN OR TRUCK AS A DELIVERY METHOD BY TYPE OF LIBRARY

Survey Questions 26 and 3 N=845 R=513

	Type of library						
Frequency	Special	Academic	Public	Elem. school	JHS + SHS	VTAE	Total
Frequently	26	3	28	20	29	2	108
Occasionally	25	6	18	17	29	0	95
Rarely	14	5	11	8	5	1	44
Never	83	21	83	39	35	5	266

FREQUENCY OF USE OF BUS AS A DELIVERY METHOD BY TYPE OF LIBRARY

Survey Questions 26 and 3 N=845 R=428

	Type of library						
Frequency	Special	Academic	Public	Elem. school	JHS + SHS	VTAE	Total
Frequently	0	0	0	1	1	0	2
Occasionally	4	0	2	2	0	0	8
Rarely	6	5	3	0	0	1	15
Never	121	29	105	68	73	7	403

FREQUENCY OF USE OF PERSONAL MESSENGER AS A DELIVERY METHOD

Survey Questions 26 and 3 N=845 R=522

	Type of library						
Frequency	Special	Academic	Public	Elem. school	JHS + SHS	VTAE	Total
Frequently	14	1	11	17	14	0	57
Occasionally	42	7	36	26	34	4	149
Rarely	28	14	28	15	13	3	101
Never	71	15	61	29	36	3	215

UTILIZATION OF COMPUTER FOR LIBRARY OPERATIONS, FIVE YEAR ESTIMATE

Survey Question 27 N=845

R=not available due to method of coding multiple responses.

Library operation	Number of libraries	Percentage of libraries
Circulation	41	5%
Acquisition	45	5
Bibliographic control or union lists of books	54	6
Bibliographic control or union lists of periodicals	48	6
Bibliographic control or union lists of audiovisual materials	8	*
Cataloging	60	7
Information retrieval (subscription to commercial data bases)	71	8
Selective dissemination of information	32	4
Teaching library use skills	13	2
Interlibrary loan	4	*

*less than 1%

UTILIZATION OF COMPUTER FOR LIBRARY OPERATIONS, FIVE YEAR ESTIMATE

Survey Questions 27 and 3 N=845

R=not available due to method of coding multiple responses.

	Type of library						
Library operation	Special	Academic	Public	Elem. school	JHS + SHS	VTAE	Total
Circulation	8	10	17	0	3	3	41
Acquisitions	11	12	7	4	6	5	45
Bibliographic control or union list of books	16	14	7	4	6	7	54
Bibliographic control or union list of periodicals	17	16	7	2	3	4	49
Cataloging	18	16	9	4	9	4	60
Information retrieval	45	11	2	0	6	6	70
Selective dissemination of information	15	9	1	1	3	3	32
Teaching library use skills	2	7	1	1	1	1	13

LIBRARY CASE STUDIES

Purpose

A research project was designed in several phases to meet the Task Force members' needs for background information. To collect broad information on cooperative activities, a survey questionnaire was sent to all public, academic and special libraries and a sample of school libraries. Detailed data on interlibrary loan and reference patterns was still needed to give a more complete picture. Eleven libraries served as case studies for documenting activity and performance levels for interlibrary loan and reference services. These case studies provided illustrative information to supplement that obtained in the broad survey. Interviews were conducted as necessary to amplify or clarify special situations.

Procedures

It was recognized from the beginning that generalizations about all libraries could not be made from individual case studies. Each library was therefore chosen to take part because it could provide detailed illustrative information on interlibrary loan and reference patterns for a particular type of library, or for a specific geographic area. An attempt was made to pick libraries which had previously arranged contracts or channels for service as well as those which did not. Only libraries indicating a willingness to commit the staff and time necessary to collect the data were included.

The time period for the study covered the two week period from February 23, 1976 until March 5, 1976. As a result of staffing problems during this time Library B kept records for a two week period beginning March 17, 1976. Library staff members traced progress on all requests generated during the initial two week period through the end of March with Library B continuing until April 15. All work sheets for requests not filled by this time were returned to the coordinator.

Each library filled out a separate work sheet for individual interlibrary loan or reference transactions. Interlibrary loan and reference transactions were broadly defined as follows:

Interlibrary loan: items borrowed in answer to specific author/title requests.

Reference questions: information received to answer questions requiring simple or complex facts or requests for material on generalized subjects. This includes compiling bibliographies or verifying particularly difficult citations. In some cases this may involve sending a photocopy or other material. If so, this request is differentiated from an interlibrary loan by the substantial amount of reference time required.

The work sheets used are shown on the following page.

Work Sheets Used by Case Study Libraries

Reference Work Sheet

#______

Request (brief description) ______________________________

____

Date Sent	Name library sent to	Date answer received
1. ______	______	______
2. ______	______	______
3. ______	______	______

Request uncompleted Date of reply	Reason not completed or other comments	No reply
1. ______	______	1. ______
2. ______	______	2. ______
3. ______	______	3. ______

Librarian's estimate of patron satisfaction:

_____very useful _____useful _____not useful _____no opinion

Time (Estimate time spent to nearest 1/4 hr.) ______________________________

ILL Request Work Sheet

#______

Citation ______________________________
(see work
sheet directions) ______________________________

Format of material
______Book ______Periodical
______A-V material (specify) ______________

Date sent	Name library sent to	Date Material Received
1. ______	______	______
2. ______	______	______
3. ______	______	______
4. ______	______	______

Request uncompleted Date of reply	Reason not completed Check each time reason listed	No reply
1. ______	____In circ	1. ______
2. ______	____On Reserve	2. ______
3. ______	____non-circulating	3. ______
4. ______	____not owned	4. ______
	____inaccurate citation	
	____other ______	

Library staff members were asked to attach a work sheet to each request and to record the process of that request. "Date sent" represented the date that the request left the individual library. "Date material or answer received" or "Date of reply" represented the date that material was actually received or the library was notified that the request could not be filled. No attempt was made to trace the time between a patron placing a request and the library actually sending it or between the time the library received the answer or material and it was actually transferred to the patron.

When requests were sent to Reference and Loan or WILS, these organizations provided information on the transactions which they made on behalf of the originating library, and this was to be included in the final record. Some caution is needed here as the information received secondhand may not have been recorded in all cases. Transactions for Library B were rechecked with the Reference and Loan Library and should be accurate in this report.

Interviews were conducted with staff members from each participating library to explain necessary procedures and determine any problems which might arise. Descriptive details concerning normal operating procedures, services offered, type of clientele served or any other items which might affect the study were collected during interviews.

General Findings

Insights can be gained by comparing data collected from these 11 institutions. Again, it should be pointed out that these generalizations do not necessarily extend beyond these case studies.

Author/Title vs. Reference Requests

Author/title requests far outnumbered reference requests for all libraries taken together. With the exception of Library E, this also applied to the individual institutions. It would appear that very few reference or subject requests were transferred between libraries. Librarians were asked to record requests whether the contact was made face to face, by telephone, or by mail. Simple referral of a patron to another institution was to be included. Either they did not record these transactions with the same degree of accuracy or diligence that they applied to recording author/title requests, or a substantially smaller volume of traffic existed. Interviews with librarians before and after the work sheets were returned indicated that both factors may have had some effect. Reference desk transactions often tend to be hectic since most of the work may take place while the librarian is working with the patron, while the staff person handling interloan frequently works in a non-public area. However, most librarians admitted that they did not refer reference questions as often as author/title requests.

Conflicting philosophies concerning reference referral may partially account for this. Several librarians expressed the opinion that sending a subject or reference request represented "sloppy" reference work. They were reluctant to send any request which had not been "converted" to an author/title request by consulting subject bibliographies or a standard reference tool such as Subject Index to Books in Print. Other librarians said that if a particular piece of information was desired, it was better to send a concise request for it and not try to "second guess" the situation by requesting books which appeared to be on the subject but for which there was no guarantee they would contain the needed information. Several said that narrowing subject requests to author/title requests might make it difficult to control such attributes as reading level or specialized interest within a subject.

A look at the statistics for and operation of three institutions serving as backup centers for requests provided additional information. The Reference and Loan Library located in Madison provides backup service for public libraries, public library systems and some school libraries. It also provides direct service to state government agencies and institutions and the 5% of Wisconsin residents who are not yet served by local libraries. Statistics in the following table represent all requests received.

Milwaukee Public Library serves as a headquarters library for a public library system. It also contracts for service with the Reference and Loan Library and serves directly three other public library system headquarter libraries and one individual public library. Statistics in the following table represent only requests which could not be filled by the Reference and Loan Library and were referred to Milwaukee Public Library.

WILS provides backup service by contract to the Reference and Loan Library and 47 university libraries in Wisconsin. All requests handled are author/title requests. This table shows the total volume of requests.

NUMBER OF AUTHOR/TITLE AND REFERENCE REQUESTS

	Author/title requests		Reference requests		Total requests		
Receiving library	Processed	Filled	Processed	Filled	Processed	Filled	Percent filled
Ref. & Loan Library	75,003	-	10,641	-	85,644	63,395	74%
Milwaukee Pub. Library	15,433	8,400	610	312	16,043	8,712	54%
WILS	68,127	54,249	-	-	68,127	54,249	80%

- Data not available

The Reference and Loan Library processed the most referred reference requests. However, reference or subject requests represent only 12% of the total requests processed.

The procedures for referring reference requests did not seem very well defined. Incoming requests were perused at the Reference and Loan Library and Milwaukee Public Library. Most requests were stated in very broad terms. Often little or no documentation was given by the originating library of sources already checked or any knowledge of special patron needs which the librarian might have picked up during the original reference interview.

Number of Transactions and Turnaround Time

The effectiveness and efficiency of interlibrary loan services can be measured in part by the number of times a library must refer a request in order to fill it (number of transactions) and the length of time between the day a request is sent out and the material or notification of inability to fill is received (turnaround time). For all libraries the turnaround time was higher for unfilled requests than for filled requests.

Most of the libraries in this study used formalized channels of some kind to funnel requests. Libraries G, H and I, college or university libraries, sent nearly all of their requests through WILS and only a few attempts were made to refer unfilled requests again. Most of the requests from these libraries were filled in one transaction. The turnaround time varied from 4.2 to 6.7 days for filled requests and from 6.0 to 7.1 days for unfilled requests. The difference between libraries may reflect the volume and complexity of the requests referred.

Libraries A, B and C, public libraries, used a larger variety of sources. Library A made an attempt to fill all requests within its own public library system first unless the staff knew from experience that Reference and Loan Library was a better source. Library B has an informal agreement with Milwaukee Public Library and sent most requests there first. Other requests were sent to Reference and Loan Library and selected out-of-state libraries when it was determined by use of union lists that these were the best sources. Library C sent most requests directly to Reference and Loan Library. For Libraries A and B approximately the same proportion of requests were filled locally as were filled by state level resources. There did not seem to be a significant difference in the number of transactions or turnaround time in either case.

Library E, a corporate library, and Library J, a private high school library, followed no rigid channels. Library J used a union list and farmed out requests to a large variety of libraries, apparently receiving good service from all. All Library J's requests were filled with one transaction on an average of 2.4 days, the shortest turnaround time of any of the libraries studied here. Library E seemed to be dealing with the most complex questions among all of these libraries and used a large variety of sources. The transaction count is highest for this library because one half of these requests were for complex reference questions which took a number of phone calls before answers were found.

Public libraries seem to have the most complex set of formal channels, and the potential number of transactions needed to fill a request could be quite high, especially if finding tools such as union lists are not available. Yet the average number of transactions needed to fill a request remained quite reasonable.

A study by Peat, Marwick and Mitchell for California analyzed a small number of requests but found quite different results. In California, system libraries took an average of 3.53 transactions to fill an interlibrary loan request, and the turnaround time averaged 12.4 days. Service from the state library averaged 17.1 days. The turnaround time is not totally comparable between the two studies since the California study counted time from the day a patron filed a request to the day notification was received. The Wisconsin case studies only recorded library to library time, yet the difference seems quite large.

AVERAGE NUMBER OF TRANSACTIONS AND DAYS PER REQUEST

Library	Average number of transactions	Average number of days per request Filled requests	Unfilled requests
A	1.2	4.6	7
B	1.24	6.6	10.7
C	1.25	6.6	7.7
D	*	4.9	*
E	1.7	*	*
F	1	5.3	*
G	1	6.7	7.1
H	1.07	4.2	6.4
I	1.01	5.7	6.0
J	1	2.4	*
K	*	*	*

*Data not available

Breakdown by Type of Material and Date of Publication

Analysis of the requests by type of material and date is only useful for those libraries with a large volume of requests. Therefore, only these are shown in the following tables.

The differences between public and academic library needs by type of material are startling. The proportion of requests for books vs. periodicals is exactly opposite, with academic libraries needing periodical articles and public libraries most often requesting books. The one school library represented needed periodical articles exclusively. The public libraries also requested microfilm frequently. This may be because of the availability of listings for special microfilm collections. Academic library requests may have been filled by microfilm, but this was not indicated on the returned work sheets.

Analysis of needs by date of publication showsno distinct differences between types of library. The academic, school and public libraries all require the greatest proportion of materials published in the 1970s with a still substantial number of requests for materials published in the 1960s. From here it drops off variably. The need for materials published prior to 1900 seems especially high for public libraries and probably reflects the high interest in genealogy among members of the general public.

TYPES OF MATERIAL REQUESTED

Type of material	Library A	B	G	H	I	J
Books	73%	67%	13%	17%	11%	0
Periodical articles	3	7	87	83	88	100%
Microfilm	18	25	0	0	0	0
Records, cassettes, tapes	6	1	0	0	0	0
Undetermined	0	0	0	0	1	0
Total	100%	100%	100%	100%	100%	100%
Number of cases	266	72	565	65	443	73

PUBLICATION DATE OF REQUESTS

Date	Library A	B	G	H	I	J
1970s	38%	31%	17%	46%	38%	70%
1960s	14	14	55	23	34	27
1950s	8	5	7	9	6	0
1940-1900	7	15	11	14	14	0
Before 1900	10	17	3	-	4	0
Undetermined	23	18	7	8	4	3
Total	100%	100%	100%	100%	100%	100%
Number of cases	266	72	565	65	443	73

CASE STUDY

LIBRARY A - PUBLIC LIBRARY SYSTEM HEADQUARTERS

Total number of work sheets returned - 277

266 were author/title requests (96%)
11 were reference or subject requests (4%)

AUTHOR/TITLE REQUESTS

Disposition of requests	Percentage of requests
Material received	64%
Material reserved	11%

(These requests can be viewed as filled requests although for eight of them material had not been received by the end of the time period.)

Request not filled	24%
No reply by end of time period	1%

Filled requests

The following figures may be somewhat misleading since only a few requests showed that they had been referred beyond the Reference and Loan Library. Exact record keeping was complicated by transferring information from teletype communication records to the work sheets. It is very possible that a higher number of requests than shown here were referred by Reference and Loan Library and eventually filled either by WILS or Milwaukee Public Library.

	Percentage of requests
Filled at public library system level	35%
Filled by Reference and Loan Library	36%
Filled by WILS	1%
Filled by Milwaukee Public Library	2%
Filled by the Federal Archives in Chicago (requests sent directly)	1%

Unfilled requests

Twenty-four percent of the requests were not filled. Of these 77% went unfilled because they were not owned by any of the libraries queried. Other reasons listed were "on order," "incorrect citation," "in circulation, but not reserved," "being cataloged," "too new," etc.

Some analysis was attempted for those requests listed as "not owned." Although it was difficult to classify some of these requests, a few trends can be seen. Seventeen percent of these requests were unverified although they appeared to be for books and may have been incorrect citations. The verified requests break down as follows:

Format	Percentage of requests
Hardback books	30%
Paperback books	42%
Newspapers (microfilm)	12%

General subject areas (for verified and unverified requests, not including newspapers)	Percentage of requests
Popular religion or psychology	29%
Fiction	19%
Science and technology	17%
Travel and recreation	10%
Social sciences	8%
Genealogy*	6%
History	6%
Reference	2%
Children's books	2%

*These actually could have been classified as reference questions. The request required that a name be checked in a book. The book was located, but the name did not appear in it. This is the reason that the request was not filled.

Publishers

Most of the books which were listed as not owned and were verified, appear to have been published by small publishing firms. As the following listing shows, about a half dozen might be considered major companies, only one firm was listed for two books.

Cole, M. M. Publishing Co. (Chicago, IL)
Belmont Tower (NY)
Fawcett (NY)
Pinnacle Books (NY)
Ace (NY)
Gulf Publishing Co. (Houston, TX)
Signpost Publications, (Lynwood, WA)
Kreiger, Robert E. (Huntington, NJ)
Human Development Training Institute (La Mesa, CA)
Paulest-Newman Press (Paramus, NJ)
Crehore, John Davenport (Phoenix, AZ)
Wehman Brothers, (Hackensack, NJ)
Cycle-Gram Associates (Hollywood, CA)
O'Hare Books (Flanders, NJ)
Keats Publishing Co. (New Canaan, CT)
Cambridge University Press (NY)
East Ridge Press (Hankins, NY)
Dos Reals Publishing (Berkeley, CA)
Fantasy Publishing Co., Inc., (Alhambra, CA)
T. F. H. Publishers (Neptune, NJ)
Harcourt-Brace-Jovanovich, Inc. (NY)
Bellentine
Hawthorn Books, Inc. (NY)
Revell, Fleming H. Co. (Old Tappan, NJ)
Freshet Press, Inc. (Rockville Center, NY)
Herman Publishing (Boston, MA)
Simon & Schuster (NY)

It appears that one area that may cause problems in book purchasing is acquiring material published by small publishing firms. This material may not be heavily reviewed in normal sources. This might be one area that should be considered if cooperative selection and purchasing arrangements are set up among libraries.

Breakdown by type of material	Percentage of requests
Books	73%
Records	4%
Cassettes	2%
Microfilm	18%
Periodicals	3%

Breakdown by date of material

The amount of requests is proportional to recency with the most recent materials being requested most often. One exception does surface. The interest in local history and genealogy coupled with the increasing availability of microfilm appears to encourage requests for materials before 1900.

	Percentage of requests
1970s	38%
1960s	14%
1950s	8%
1940s--1900	7%
Before 1900	10%
Date undetermined	23%

Number of transactions

The average number of transactions per request after leaving the headquarters library was just over one (1.2). Thirty-five percent of the requests sent out were being referred for other system libraries. Therefore, nearly one third of the total number of requests would average 2.2 transactions per request.

This library follows fairly routine procedures in referring requests. The first contact is made through their own teletype system. If the item requested is not located, the request is sent to the Reference and Loan Library in Madison. Reference and Loan refers requests which it cannot fill to Milwaukee Public Library or WILS. For certain materials, requests are sent directly to Reference and Loan when it is known to be the best source. Therefore, if a request is initiated in a branch or system library, it can conceivably be referred as many as four times before being filled or returned unfilled. As can be seen from the average transaction number, most were not referred this many times. (Only one request from 277 was actually referred four times and was eventually filled in 12 days.)

Turnaround time

Turnaround time varied with the number of transactions and the difficulty of filling the request. On the average it took 4.6 days to fill a request for which material was received or in some cases reserved. It took an average of seven days to notify a library that the request could not be filled after checking all available sources. The range of days extended from a single day turnaround from the time a request was sent and the material received to as long as 20 days. A number of requests were still not filled at the end of the period.

REFERENCE REQUESTS

The number of reference requests was so few that it is very difficult to make any generalizations. Most were only moderately difficult. Only one was not filled. The turnaround time was roughly six days and required one or two transactions.

CASE STUDY

LIBRARY B - PUBLIC LIBRARY (non-system)

TOTAL NUMBER OF WORK SHEETS RETURNED - 72

All were author/title requests

AUTHOR/TITLE REQUESTS

Disposition of requests	Percentage of requests
Material received	73%
Requests unfilled	23%
No reply	4%

Breakdown by type of material	
Books	67%
Microfilm	25%
Records	1%
Periodicals	7%

Breakdown by date	
1970s	31%
1960s	14%
1950s	5%
1940s	5%
1930s--1900s	10%
Before 1900	17%
Date undetermined	18%

Number of Transactions

This library sent requests to a wide range of sources. In many cases the availability of the material had been verified by use of a union list. This is reflected in the number of transactions needed to fill requests which is quite low (1.24 transactions per request).

Referral patterns for filled requests	Percentage of requests (N=52)
Milwaukee Public Library	29%
Reference and Loan Library	33%
WILS	4%
University (out of state)	5%
Maryland State University Library	
Temple University Library	
Iowa State University Library	
Special libraries (out-of-state)	19%
Chicago Archives Center for Research Libraries	
Special library	10%
State Historical Society of Wisconsin	

Turnaround time

Filled requests — average of 6.6 days
Unfilled requests — average of 10.7 days
Range for all requests — 3 to 26 days

Unfilled requests

Of the 16 requests unfilled, nine were for materials not owned by any libraries queried. Four were for materials which were in circulation, one was for noncirculating material and two requests were canceled before an answer was received. No reply had been received for three requests at the end of the period. These three requests had been out for between 20 and 26 days.

A comparison between fills at Milwaukee Public Library and the Reference and Loan Library shows a few insights. This library has an informal agreement with Milwaukee Public Library and usually tries sending requests there first. A total of 32 requests were sent to Milwaukee. Fifteen were filled at Milwaukee and 17 were sent to Reference and Loan. Reference and Loan filled seven and referred one to WILS where it was filled. Six were not filled either place but not referred to WILS because they were not listed in the University of Wisconsin microfilm holdings, or preliminary phone checking had revealed that the material was not available. No reply had been received from Reference and Loan on three of the requests.

CASE STUDY

LIBRARY C - PUBLIC LIBRARY (non-system)

TOTAL NUMBER OF WORK SHEETS RETURNED - 19

16 were author/title requests
3 were reference or subject requests

AUTHOR/TITLE REQUESTS

Disposition of requests	Number of requests
Material received	13
Requests unfilled	3
No reply by end of time period	1

Breakdown by type of material	
Books	
Reference books	2
Government document	1
Microfilm	3

Breakdown by date	
1970s	9
Before 1970s	1
Before 1900	3
Date undetermined	3

Turnaround time

Filled requests -- average of 6.6 days
Unfilled requests -- average of 7.7 days
Range for all requests -- 1 to 13 days

Number of transactions

12 requests took one transaction
4 requests took two transactions

Most requests were sent to the Reference and Loan Library. Two were eventually filled by Milwaukee Public Library and one was filled by WILS. Three requests were sent to the Wisconsin State Historical Society and in one case a local special library was contacted. The average number of transactions per request was 1.25.

REFERENCE OR SUBJECT REQUESTS

Three requests fit into this category. In two cases local nonlibrary sources were contacted and successfully filled the requests. In one case a subject request was referred to the Reference and Loan Library and was filled.

CASE STUDY

LIBRARY D - CORPORATE LIBRARY

TOTAL NUMBER OF WORK SHEETS RETURNED - 17

15 indicated materials borrowed
2 indicated materials loaned (not analyzed)
All were author/title requests

AUTHOR/TITLE REQUESTS

Disposition of requests	Number of requests
Material received	10
Requests unfilled	5

Breakdown by type of material

Books (includes conference proceedings)	7
Periodicals	8

Breakdown by date

1970s	8
1960s	6
1950s	1

Number of transactions

Range 1 to 11

An average has little meaning here since one request remained unfilled after 11 attempts to locate it. This would skew the average and the raw figures seem to give a better picture. Ten requests were filled after the first try, three by a public library and seven by the Wisconsin Information Services, a fee-based service located in the University of Wisconsin Engineering Library. Two requests (both for foreign materials) remained unfilled after one attempt but were not referred elsewhere. Two requests were unfilled after two attempts and were not referred elsewhere. An intensive search was conducted for one request with 11 unsuccessful attempts being made to fill it, including contacts with one public library, eight special libraries and two university libraries. Most of the requests were sent to Wisconsin Information Services in Madison.

Turnaround time

The material was received or the request terminated in 13 cases. The time span needed to process requests varied from one to seven days. The average time for receipt of material or notification of inability to fill was 4.9 days per request. Two requests remained unfilled at the end of the reporting period.

Unfilled requests

The reasons for unfilled requests were readily determined. In two cases materials were at the bindery and on another two occasions the requests were for articles in a foreign publication which could not be located. The request for which 11 attempts were made was for a 1969 book and was eventually ordered by the library. The librarian indicated in a follow-up conversation that he had eventually discovered that it was available through one of the academic institutions tried earlier, indicating an error in the initial check on their part.

CASE STUDY

LIBRARY E - CORPORATE LIBRARY

TOTAL NUMBER OF WORK SHEETS RETURNED - 23

10 were author/title requests
13 reference or subject requests

AUTHOR/TITLE REQUESTS

Disposition of requests	Number of requests
Material received	8
Requests unfilled (The library purchased the material to fill one of these requests)	2

Breakdown by type of material	
Books	1
Technical reports	4
Periodicals	5

Breakdown by date

Dates were not reported for enough requests to make analysis useful.

REFERENCE REQUESTS

Disposition of requests

Answers were received or materials sent for all requests. This library was the only one which referred a substantial number of difficult reference questions.

Breakdown by type of request	
Reference requests	9
Subject requests	2
Computer search	2

ALL REQUESTS

Turnaround time

Exact dates for receipt of materials were not recorded for a number of requests. When reported, the span from the time requests were made to the time materials or answers were received ranged from one to 20 days. The telephone was used for most of the reference requests, and answers may have been received immediately. In several cases, the work sheet indicated that the material was picked up at another local library by someone on the staff.

Number of transactions

The number of transactions needed to fill requests ranged from one to five. The average was 1.7 transactions.

The librarian used a wide variety of sources to fill requests. The public library was contacted 12 times and successfully filled the request eight times. Academic libraries were contacted twice and in neither case were successful. Wisconsin Information Services was contacted seven times (once for a computer search) and was successful in filling five requests. The librarian contacted a large variety of special libraries, many of them out-of-state, to fill the remaining requests.

CASE STUDY

LIBRARY F - SPECIAL LIBRARY (dealing with archival material)

TOTAL NUMBER OF WORK SHEETS RETURNED - 18

All were author/title requests

AUTHOR/TITLE REQUESTS

Disposition of requests

All requests were filled and material was received.

Breakdown by type of material	Number of requests
Census materials	3
Manuscripts	14
Periodicals	1

These materials dealt with genealogy, local history, and included requests for portions of major research collections. The latter are borrowed by faculty members infrequently and for extended periods of time.

Breakdown by date

Because of the nature of the library, these requests were for very old materials, usually dated before 1900.

Number of transactions

All requests were sent to the State Historical Society of Wisconsin and were filled there. All were therefore filled with one transaction.

Turnaround time

The time span needed to process requests ranged from four to eight days. The number of days from the time the request was sent until the material was received averaged 5.3 days.

CASE STUDY

LIBRARY G - PUBLIC 4 YEAR UNIVERSITY

TOTAL NUMBER OF WORK SHEETS RETURNED - 571

565 were author/title requests
6 were reference or subject requests

AUTHOR/TITLE REQUESTS

Disposition of requests	Percentage of requests
Material received	88%
Requests unfilled	4
No final reply by the end of the time period	8

Breakdown by type of material	
Books	13%
Periodicals	87

Breakdown by date	
1970s	17%
1960s	55
1950s	7
1940s-1900	11
Before 1900	3
Date undetermined	7

This represents a different emphasis than most of the other case studies. Requests for materials in other libraries studied tended to be for a heavier proportion of items dated 1970 or later. The sample of requests from Library G for this time period shows a much heavier number of requests for materials published in the 1960s.

Number of transactions

All requests were sent to WILS and involved one transaction.

Turnaround time

Filled requests -- average of 6.7 days
Range for all requests -- 1 to 22 days

The 44 requests which remained unfilled at the end of the time period could cause a change in the above results when eventually filled. As of approximately April 12 these requests had been outstanding for from 25 to 39 days.

During the time period covered, Library G accepted an unusually large number of requests (approximately 300) from one patron. Some of these were for items that may have been more difficult than normal to locate. This may explain the longer than usual time period for a final reply to be received from WILS in this case.

Unfilled requests

The percentage of unfilled requests was relatively small. Of the 24 requests reported unfilled, 13 were reported not owned, one was lost, two were in circulation and not reserved and eight were not filled because the citation proved to be incorrect.

Foreign language publications

Two hundred thirty of the periodical requests (47%) referred by Library G were for foreign publications. One hundred (30%) of these were for non-English language publications. Nine of the 24 unfilled requests and 19 of the 44 requests for which WILS was still searching were for foreign publications.

REFERENCE REQUESTS

This library filled out reference request forms for requests referred to sources other than WILS. Of these, two were for periodical articles and one for a book title. These three could well have been added in with the totals for author/title requests. The other three required checking specific indexes or reference materials for information. Three requests were sent to university libraries and three to public libraries.

RECIPROCAL BORROWING ACTIVITIES

Library G allows members of the general public to borrow items directly from the library as well as through normal interlibrary loan channels. During the time period covered by the study, the circulation department tabulated the number of materials circulated directly to borrowers other than the library's primary clientele. This breakdown follows:

Total circulation	3302
Circulation to special borrowers	991

Circulation to outside borrowers represented 30% of the total circulation for this library.

CASE STUDY

LIBRARY H - PRIVATE COLLEGE LIBRARY

TOTAL NUMBER OF WORK SHEETS RETURNED - 65

All were author/title requests

AUTHOR/TITLE REQUESTS

Disposition of requests	Percentage of requests
Materials received	80%
Requests unfilled	18
Undetermined	2

Breakdown by type of material

Books	17%
Periodicals	83

Breakdown by date

1970s	46%
1960s	23
1950s	9
Before 1940	14
Date undetermined	8

Number of transactions

All requests were sent to WILS which filled the majority with one transaction. WILS referred five of the requests to MINITEX, requiring two transactions. The average number of transactions was therefore very close to one (1.07).

Turnaround time

Filled requests -- average of 4.2 days
Unfilled requests -- average of 6.4 days
Range for all requests -- 1 to 9 days

Unfilled requests

Of the 12 unfilled requests, six were listed as "not owned," three were at the bindery, one was being recalled and two were still being sought through MINITEX at the end of the time period.

CASE STUDY

LIBRARY I - PRIVATE UNIVERSITY LIBRARY

TOTAL NUMBER OF WORK SHEETS RETURNED - 444

443 were author/title requests
1 was a reference or subject request

AUTHOR/TITLE REQUESTS

Disposition of requests	Percentage of requests
Material received	95%
Requests unfilled	5

Breakdown by type of material

Books	11%
Periodicals	88
Undetermined	1

Breakdown by date

1970s	38%
1960s	34
1950s	6
1940s	4
1930s	6
1920-1900	4
Before 1900	4
Date undetermined (19)	4

Number of transactions

Most requests were sent directly to WILS and required only one transaction. This library did, however, occasionally refer requests to two nearby university libraries and on three occasions sent requests to libraries in other states. Only four requests required two transactions and two of these were still not filled.

Turnaround time

Filled requests -- average of 5.7 days
Unfilled requests -- average of 6.0 days
Range for all requests -- 1 to 23 days

Unfilled requests

The percentage of unfilled requests was very small. A few interesting notes might be made, however, of the 22 unfilled requests, eight (or 36%) of which were for books. Books made up only 11% of the total requests. Fifteen items were unavailable because they were not owned, four were owned but in circulation and for three the citations were inaccurate.

CASE STUDY

LIBRARY J - PRIVATE HIGH SCHOOL LIBRARY

TOTAL NUMBER OF WORK SHEETS RETURNED - 73

All were author/title requests.

The librarian indicated that this was an exceptionally heavy load compared to a normal two week period. The extra requests were due to an unusual class assignment made by a teacher.

AUTHOR/TITLE REQUESTS

Disposition of requests	Percentage of requests
Materials received	98%
Requests unfilled	2

Breakdown by type of materials

All requests were for periodical articles.

Most of the requests were generated by student use of the Reader's Guide to Periodical Literature. The librarian used a local periodical union list to determine who held the magazine and farmed out the requests as equitably as possible. That all requests were for magazines was viewed by the librarian as typical. Most students indicated that they went to the local public library for books. Since most of these magazines were probably also available at this public library, it might be inferred that the ease of using local tools such as the Reader's Guide combined with easy borrowing channels encouraged the use of periodicals in this instance.

Breakdown by date	Percentage of requests
1970s	70%
1960s	27
Date undetermined	3

Number of transactions

All requests were filled with one transaction. Only one attempt was made to find the material for the one unfilled request.

The librarian referred requests to several different libraries. The breakdown by type of library follows:

	Percentage of requests
Academic libraries (4 libraries)	74%
Public library	3
School libraries (2 libraries)	23

Turnaround time

The time span from the day the requests were sent out to the day the material was received ranged from one to seven days. The average was 2.4 days.

Other referral and borrowing patterns

As indicated earlier many students said that they used the public library quite frequently. The librarian also referred students to a nearby college library seven or eight times a semester when special needs warranted this practice.

CASE STUDY

LIBRARY K - SCHOOL DISTRICT LIBRARY

This library referred a very small volume of requests as only five work sheets were returned. In all cases the students were referred directly to a local public library for materials. In only one case did the library receive a report that the student was unsuccessful.

WILS UNFILLED INTERLIBRARY LOAN REQUESTS

November 1975

Analysis of unfilled requests

WILS is a state level resource which provides interlibrary loan service to 47 academic institutions and the Reference and Loan Library. Academic institutions contracting with WILS send requests directly, and for many, this transaction represents the first and only attempt to obtain the material. Requests coming from the Reference and Loan Library have already been referred several times since leaving the originating library. In most cases this is the final referral.

An analysis of unfilled requests for WILS should give some insight to why requests remain unfilled at the state level. Requests were analyzed for the month of Novermber 1975. WILS logs and the requests themselves were used in the analysis. Reasons listed for inability to fill requests were tabulated for all libraries and compared to those for the Reference and Loan Library and a private university which is a heavy WILS user. These figures are shown in the following table:

REASONS FOR UNFILLED REQUESTS--November 1975

Reason request unfilled	WILS +	Reference & Loan	Private university
In circulation	15%	20%	12%
Has been reserved	*	2	*
Owned but can't be loaned	4	8	2
Impossible to send	2	*	1
Not owned	56	59	51
Volume not owned	6	2	13
At the bindery	2	*	4
Lost	7	7	8
Not yet received	*	*	*
Citation incorrect	8	3	8
Number of requests	735	433	131

All figures are rounded off and columns may not exactly total 100%.

*Less than 1%

+Does not include requests from Reference and Loan.

The majority of requests remained unfilled after referral to WILS because the material requested was not owned. WILS sometimes refers requests to MINITEX in Minnesota; therefore, this would indicate that most of these materials are unavailable in a two-state area. According to annual statistical records, WILS annual fill rate for 1974-75 averaged 80%. For academic libraries it ranged from 71% to 93%. The fill rate for the Reference and Loan Library was the lowest at 63%. Academic libraries request periodicals most often while the Reference and Loan Library has a greater need for books. Eighty-five percent of unfilled requests for Reference and Loan during November were for books with only two percent for periodicals. It would appear that WILS can successfully provide backup service for nearly all the periodical articles which the Reference and Loan Library requests. The wide range of requests for books (both subject and reading level) makes it more difficult to meet these needs from the University of Wisconsin, Madison collection. Unfilled requests for the private university split about evenly with 40% for periodicals and 48% for books. However, a look at total requests indicates that the private university asks for considerably fewer books than periodical articles. Therefore, the higher percentage of book requests remaining unfilled may indicate that book requests are more difficult for WILS to fill in general.

The second main reason requests were not filled was because the materials were already in circulation. This accounted for 15% of unfilled requests in November, 1975. Since bound volumes of periodicals are usually not circulated, they are available for photoduplication and requests for periodical articles can be filled easily. Books are more likely to be in circulation and are rarely, if ever, photocopied in entirety to fill a request. Requests for materials which are in circulation can be reinitiated and may be filled eventually.

Incorrect citations did not seem to be a major source of unfilled requests during the period studied. These requests often are, however, a major source of frustration, and a small number can be time consuming. The percentage shown may not reflect the true number of requests in this category. To be so labeled, a citation must be identified as incorrect by the staff member searching for it. Some requests may simply be marked "not owned" if nothing makes the staff member suspicious enough to check further.

A breakdown of requests by various categories for the Reference and Loan Library and the private university follows.

REFERENCE AND LOAN LIBRARY - UNFILLED REQUESTS

Total number of requests analyzed - 433.

Breakdown by type of material	Percentage of requests
Periodicals	2%
Microfilm*	13
Monographs	85

*Many of the microfilm requests were for old newspapers or census records. The most frequent reasons these requests were not filled were because the material was in circulation or was not owned. (In circulation = 35%, not owned = 42%.)

Breakdown by subject area	Percentage of requests
This was determined for 90% of requests	
Historical materials*	28%
Science and technology	14
Medicine	10
Social sciences	8
Education	6
Religion	6
Psychology	4
Geography, anthropology, customs, recreation	4
Art, music	4
Language	4
Literature	4
Biography	2
Political Science	2
Philosophy	2
Law	2

*Since this seems rather high, a further breakdown may be useful. Eighteen of these requests were for old newspapers, census records, and other public records, items probably related to the need for genealogical information.

Breakdown by date of publication	Percentage of requests
1970-75	46%
1960-69	15
1900-59	7
Before 1900 (includes microfilm)	17
Date undetermined	15

PRIVATE UNIVERSITY LIBRARY - UNFILLED REQUESTS

Total number of requests analyzed - 131

Breakdown by type of material	Percentage of requests
Periodicals	40%
Monographs	48
Technical reports	9
Microfilm	3

Breakdown by date of publication	
1970s	48%
1960s	30
Before 1959	18
No date	4

Subjects

This breakdown was not too useful as subjects seemed evenly distributed. Leading subjects were the social sciences, science and technology and medicine.

Requests for:	Percentage of requests
Faculty	3%
Students	97

SUMMARY OF GALLUP STUDY

THE ROLE OF LIBRARIES IN WISCONSIN

During 1975, the Gallup Organization conducted a number of surveys measuring attitudes and behavior toward information sources and library use. Two have broad implications for Wisconsin planning efforts. The first investigated these areas nationally and the second focused on Wisconsin. Since many questions overlap in both surveys, Wisconsin can be compared with national trends.

On a general level, the survey was designed to discover what sources of information people use to satisfy their needs, where they turn to obtain this information and how often a library is used as a source of information. Most of the remaining questions center on the use of public libraries rather than other types of libraries.

The Wisconsin survey was based on telephone interviews with a representative state sample of 428 adult men and women age 18 years and older. The national survey utilized a probability sample similar to that used in all Gallup "trends" surveys, and involved face to face interviews.

SOURCES OF INFORMATION

While people use a variety of sources for obtaining information, printed materials are still predominately used to resolve problems or answer questions. When respondents nationally were asked to recall sources used personally within the last two months, 82% mentioned printed matter (newspapers 62%, magazines 39%, books 35%). The second leading source of information was television. Friends and relatives ranked slightly above radio as a source used to answer questions.

LIBRARY USAGE

The use of libraries generally is somewhat heavier in Wisconsin than in the nation as a whole. Sixty-one percent of Wisconsin residents reported having used a library in the past two years, as compared with 49% nationally. In Wisconsin, only 8%-9% (difference in text and tables) report never using a library, as compared to 17% nationally.

The 61% of the population who claimed they had used a library within the last two years were asked what type of library they had used most recently and then what other types of libraries they had also used. Ninety-one percent had used a public library over this period, with 31% using a school library, 9% using a private library, and 8% using a business library. Seventy-two percent had used a public library most recently, with 19% claiming most recent use of school libraries, and another 6% naming a private or business library. When these figures are converted to show use of Wisconsin libraries by type by all Wisconsin residents, both library users and non-users within the past two years, 55% use public libraries, 19% use school libraries, and 11% use private or business libraries. Nationally

44% use public libraries with other figures closely paralleling Wisconsin use. All respondents to this question were adults 18 years or over, therefore, school library refers to use of college and university libraries.

There may be two possible factors which are related to the higher usage of libraries in Wisconsin than in the nation as a whole. First, the Wisconsin population compared to the U.S. is more highly educated, and there is a smaller proportion of lower socioeconomic households in Wisconsin than in the nation. Both factors predispose a higher rate of general readership and in turn a higher rate of library usage. Secondly, library usage in Wisconsin is more evident in all sectors of society than is the case nationally. The less well-educated person in Wisconsin is more likely to use a library than is his counterpart nationally. This relationship is evident when analyzing other characteristics related to library usage such as age, occupation and level of readership. It seems that Wisconsin libraries have been more successful in attracting groups who are not generally predisposed to library usage. In Wisconsin, in particular, women are significantly more likely than men, and Milwaukee area residents more likely than others, to use the library.

SUMMARY OF LIBRARY USAGE BY DEMOGRAPHIC GROUPS

	Used any library in past 2 years %	Used public library in the past two years %	Number of interviews
Total	61	55	(428)
Sex			
Male	56	49	(213)
Female	65	61	(215)
Age			
18 - 34 years	76	67	(185)
35 - 49 years	59	53	(108)
50 years and older	45	43	(133)
Education			
Any college	91	83	(146)
High school graduate	56	51	(208)
Not a high school graduate	38	34	(74)
Occupation of respondent			
Professional and business	78	74	(87)
Clerical and sales	76	72	(55)
Manual labor/farmer	50	43	(136)
Non-labor force	58	52	(139)

	Used Any Library in Past 2 Years %	Used Public Library in The Past Two Years %	Number of Interviews
Region			
Milwaukee area	66	62	(152)
Rest of state	58	52	(276)
Readership			
3 Heavy	89	81	(156)
2	52	47	(165)
1	34	31	(68)
0 Light	49	42	(39)

READING HABITS

The reading habits of Wisconsin residents are similar to those for the Midwest and for the nation as a whole. Fifty-nine percent read all or part of a book in the last month and 87% accomplished this within the last year. More books were read by the young, college educated white collar workers than by any other demographic group. Nine out of ten respondents read their most recent book for their own enjoyment. Eight percent said that the last book they read was for work or school, while another 3% said "both". The respondents most frequently read fiction books (38%) followed by non-fiction (28%) and specialty or reference books (27%).

Over three-quarters of Wisconsin residents reported reading a newspaper every day, as compared with 66% nationally. The number of magazines read per week was also slightly higher than the national trend.

The library (named by 41% of the respondents) is the most popular single source of books read in the past year. This reflects a higher incidence of library usage than occurs nationally (27%) or in the Midwest as a whole (25%). As in the rest of the country, few people indicated that they obtained magazines and newspapers from the library, most being obtained by personal subscription.

PUBLIC LIBRARY USE

Those respondents using public libraries made an average seven visits in the past year. As in the national study, there is in Wisconsin a high awareness of the library as an institution providing reading materials (64% mentioned book loans) and very little unaided awareness of other types of services that might be available. Other service recognized included reference service (39%) magazines or newspapers (30%), record loans (28%), and movies (14%). The utilization rates are considerably higher for these services than the unaided awareness levels might lead one to expect.

Wisconsin library users live closer to the public library they use most frequently than is the case nationally. Fifty-two percent of Wisconsin public library users live within 2 miles of this public library compared to 43% nationally and 39% in the Midwest. Seventy percent use only the closest public library.

Nearly three out of four users felt that the public library was very easy to use, while another 20% found it fairly easy to use. Most of those who found the library confusing could not readily define what it was that caused this situation.

NON-USERS

The reasons given by those who had not used the public library in the past two years closely paralleled national trends. The two most frequently given reasons were "not interested or no need" (35%) or not enough time (34%). Other responses indicated that some nonpublic library users obtained reading material elsewhere, used other libraries or sources (8%), bought books (4%), read newspapers and magazines (11%) or had enough books of their own (15%). Most nonusers see the library as a place to get books. Many of the services they list as possibly convincing them to use the library are, in fact, available in many areas. Classes in crafts or basic skills were listed by 37% as a desirable service which they might use if it were available.

INTERLIBRARY LOANS

An attempt was made to measure the use of interlibrary loan service by public library users. Nearly half (45%) of public library users indicated that they had at some time wanted a book or magazine article which was not available from their local public library. In 90% of these cases a library employee was asked for help and in 75% of these instances the library employee offered to obtain the book or article from another source. Respondents reported actually receiving the material 84% of the time. This results in a net figure of about one in four public library users who have obtained desired materials through interlibrary loan which is consistent with those claiming to have used interlibrary loan service in a previous question analyzing use of all types of services offered by public libraries. Nationally only 12% claimed to have used this service.

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